Remit and role of the Inclusion in Finance communities

Membership: Inclusion in Finance (IiF) community members are individuals who are passionate about a specific dimension of DEI addressed by the community. Members are either employees of IiF member firms or IiF Ambassadors. Each community is led by one to three co-leads.

Goals: Each IiF community focuses on a specific dimension of diversity and, in partnership with the IiF COO, develops its own strategy and deliverables, which must be consistent with and aligned to the overall IiF ambitions (see below). We hope that all our communities will:

- Provide a forum for sharing experiences
- Raise awareness of issues relevant to the community
- Launch new initiatives to help address identified issues
- Organise events and mark celebratory dates relevant to the community
- Create content (such as LinkedIn posts, videos or podcasts), as well as develop best practice guides and case studies
- Provide input to IiF taskforces
- Ensure coordination with relevant Employee Resource Groups (ERGs) from IiF member firms

Responsibilities:

- Setting the community's key strategic objectives for its specific focus area, ensuring alignment with the IiF overall mission and ambitions (see below) and that actions deliver a positive impact across the industry. Input should be sought from other IiF communities (including the Steering Committee, SC) to maximise impact
- Ensure that initiatives, events, programmes and overall activities are executed and delivered in a timely manner and are coordinated with other IiF communities and taskforces
- Sharing of best practices with other IiF communities
- Create content and keep the IiF website updated with relevant resources
- Work in collaboration with relevant partner organisations
- Share resources and materials relevant to the topics of interest (where applicable)
- Act as representatives for IiF both externally (via press, or engage via social media) and within member firms

Community meetings and attendance: Each IiF community has different meeting schedules, most typically convening virtually every 1-2 months, to discuss progress. Community members are expected to attend and participate in these meetings.

Additional responsibilities of the community (co-)leads:

- Ensure that each community has the right representation of participants, to bring cognitive diversity in all interactions
- (Co-) chair regular community meetings, ensuring an agenda is shared in advance to maximise productivity and participation
- Join the IiF SC and attend the meetings to provide an update on their community activities
- Attend IiF community leads meetings, which are an opportunity to discuss areas of possible collaboration (intersectionality), raise issues of concern, hear back from any

Advisory Council or SC feedback, share progress and seek guidance on barriers and challenges
    - IiF community co-leads must ensure that their community is represented at those meetings, and must seek a deputy from within the community if they are unable to attend
- Help coordinate or participate in the organisation of community events (where applicable)
- Participate in relevant industry events, furthering IiF's agenda and actions and act as an IiF spokesperson (where relevant)
- Updating the IiF administrative team on membership changes

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IiF's global ambitions for the next five years:

- Inclusion of all: Ensuring opportunity, access and positive working environments for everyone across financial services
- Greater focus on cognitive diversity: Building awareness, tools and leadership capability to harness diverse thinking as a driver of innovation and performance
- Address under-representation: Expanding proven programmes to improve representation across socio-economic backgrounds, gender, ethnicity, neurodiversity and disability
- Global financial sector impact: Strengthening coordination across the UK, Europe and North America with a global framework and local adaptation
- Further, faster progress: Launching a new accreditation framework, enabling firms to benchmark progress and track long-term outcomes

IiF's mission, vision and values:

Our mission: To reshape the financial services industry to achieve better outcomes, underpinned by the twin foundations of inclusion and cognitive diversity to power robust decision-making and drive long-term business success.

Our vision: By getting this right, we will have embedded inclusion, created opportunity for all talent, and develop cognitive diversity that powers innovation. This creates value for clients, member firms and individuals as well as finance globally in the long-term. In this future, representation improves, culture thrives, and the industry appeals to, attracts and develops a broad range of exceptional talent. This finance industry earns trust because it delivers sustainable success to clients.

Our values (Our fundamental beliefs and guiding principles):

- Bold leadership: We challenge the status quo to create meaningful change
- Evidence-led: Our strategy is grounded in data and measurable business impact
- Collaborative impact: We amplify progress by working together across the industry
- Respectful challenge: We welcome diverse perspectives to drive better solutions