



INSIGHT TO ACTION PLATFORM OPPORTUNITY

IDiF's "Insight to Action" Platform, a "Google Maps" for Financial Inclusion, will be a free and public resource that will coalesce the networks, resources, and leading practices needed to make the financial asset management sector more inclusive of historically excluded groups.

We believe the ITA (Insight to Action) platform will be THE trusted source for practitioners within the financial services industry to source relevant data as it relates to diversity, equity, and inclusion. This is just one of IDiF's THREE PRIMARY programmatic initiatives to move the needle, and change the 1.4%.

What's Been Done – The "Back of the Napkin"

PHASES 1 & 2: FALL 2022 – SPRING 2023

IDiF was selected **twice** to partner with Columbia University's SUMANI program, who were critical in building the first two phases of the platform. Phase I was the development of an Airtable interface and Phase II was getting the ITA platform one step closer to being a publicly viable tool. Together with IDiF, the students were able to accomplish the following:

- Categorize the entirety of IDiF's DEI research database and materials by resource type and keyword, making them searchable.
- Analyze all content to capture relevant keywords, subject matter, and publisher type.
- Create a framework for development of a public-facing platform.
- Collect qualitative and quantitative feedback from relevant user groups
- Gather feedback and identify enhancements needed, making recommendations for future design
- Assess the degree to which the data can assist in business objectives and document use cases for the Platform

What's Next – With Your Contribution

PHASE 3 & 4: FALL 2023 – SPRING 2024

With your catalytic support, we are looking to complete the next phases of the Insight to Action Platform, and truly create the "Google Maps" for Financial Inclusion.

PHASE 3

- Hire staff to develop the platform from a "back of the napkin" Airtable tool, to a user friendly and robust and trusted resource.
- Implement Feedback from SUMANI research groups including gaps in data and searchability
- Expand library of resources, data, assets
- Update features including search and filter mechanisms, add keywords – increasing SEO

PHASE 4

- Define a communication campaign to drive usage of the Platform
- Build submission repository and review process, collecting contributions from stakeholders
- Continue to maintain and grow data, verify relevance, due diligence, etc.
- Identify the gaps and when new resources are become available
- Improve usability – Metrics, upvoting, tagging, favorites, case studies, shareability, etc.



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We need your support to make ITA a public, free and trusted data resource that will merge the networks, resources, and best practices needed to make the financial asset management sector more inclusive of historically excluded groups.

ABOUT IDiF:

IDiF is a non-member 501(c)(3) driving equitable access to capital to accelerate economic justice, power, and influence. Through our education and awareness programs, IDiF shines a light on the opportunities, organizations and leaders across the DEI landscape.

RESOURCES:

(click the link below)

[Insight to Action Video Demonstration](#)

[Phase I: Fall 2022 Report from the SUMANI students](#)

[Phase II: Fall 2023 Report from the SUMANI students](#)

[Insight to Action Usability Report](#)

THE INSIGHT TO ACTION PLATFORM INTERFACE:

The screenshot shows the IDiF Resource Hub interface. At the top, there is a search filter section with a 'Reset' button. Below the filter is a table with 11 rows of resource data. The table columns are: Publisher Type, Resource Type, Organization, Resource Name, Resource link, Year, Keywords, and Description. The resources listed include reports from KPMG, Cornerstone Capital Group, SSRN, Knight Foundation, National Venture Capital Association, Filene, UN PRI, AAAIM, Just Capital, AON, and Glenmede.

☐	🏢 Publisher Type	📄 Resource Type	🏢 Organization	📄 Resource Name	🔗 Resource link	📅 Year	🏷️ Keywords	📄 Description
1	Private Financial Institutions	Reports	KPMG	On the 2022 board agenda	https://boardleadership.kpmg.us/relevant-...	2022	Education Advocacy Gender Governance	Eight issues for boards to keep in mind as they ...
2	Public Financial Institutions	Reports	Cornerstone Capital Group	Cornerstone Capital Group: Investing to Advance Raci...	https://cornerstonecapin.com/wv-...	2020	BIPOC	
3	NGO / Nonprofit / Foundations / Research ...	Reports	SSRN	Do Diverse Directors Influence DEI Outcomes?	https://delivervpdf.ssrn.com/delivervph2-...	2022	Business Case BIPOC Gender Women	We examine whether greater board diversity l...
4	NGO / Nonprofit / Foundations / Research ...	Reports	Knight Foundation	Knight Foundation: Knight Diversity of Asset ...	https://knightfoundation.org/reports/knight-diversity-...	2021	Gender Women BIPOC Business Case	
5	NGO / Nonprofit / Foundations / Research ...	Reports	National Venture Capital Association	National Venture Capital Association (NCVA): 202...	https://nyca.org/research/nyca-deloitte-human-...	2020	Gender Women BIPOC Latino/Latina	This survey collected information from 378 V...
6	NGO / Nonprofit / Foundations / Research ...	Reports	Filene	Beyond Legacy Lending: Strategies for Loan Growt...	https://filene.org/learn-something/reports/beyon-...	2021	Business Case Governance	Explore how credit unions adapt to new paradigms...
7	IGO	Reports	UN PRI	Principles for Responsible Investing (PRI): Latest ...	https://www.unpri.org/diversity/449.subject	NA	BIPOC Gender Women	Case studies compilation source
8	NGO / Nonprofit / Foundations / Research ...	Organizations/Network	AAAIM	Association of Asian American Investment ...	https://aaaim.org/	NA	Diverse Manager Gender Women	a national 501 (c)(3) non-profit organization ...
9	NGO / Nonprofit / Foundations / Research ...	Reports	Just Capital	Americans Want to See Greater Transparency on ...	https://justcapital.com/reports/americans-want-...	2022	Governance Environmental	Americans overwhelmingly support...
10	Public Financial Institutions	Reports	AON	AON: Diverse Manager Investing Survey Report ...	https://insights-north-america.aon.com/alternat-...	2021	BIPOC Women Gender	This report examines the potential challenges ...
11	Private Financial Institutions	Reports	Glenmede	Glenmede: Racial Equity Investing Opportunities fo...	http://go.glenmede.com/racial-equity	2020	BIPOC Diverse Manager	