



"It is clear to investors that inclusion is a material issue, but until now, investors have not had the proper guidance to most effectively measure and engage with inclusion. ILN's Inclusion Playbook and its Inclusion Metrics mark the beginning of a new era of investors' approaches to diversity, equity, and inclusion (DEI). We hope that the Playbook will help drive DEI outputs meaningfully across the private sector."

– Ziad Hindo, Chief Investment Officer, Ontario Teachers' Pension Plan



ABOUT US

The Investor Leadership Network (ILN) is an open and collaborative platform for leading investors interested in addressing fundamental, long-term sustainability and systemic challenges. As a direct outcome of Canada's 2018 G7 presidency, the ILN drives change through concrete actions and global partnerships.

Members collaborate and pool resources, expertise, and networks to develop, promote, and deliver concrete and scalable initiatives on climate change, diversity, equity, and inclusion (DEI), and sustainable infrastructure in emerging markets.



Inclusion Playbook

Setting the Standard for Workforce Inclusion

ILN members believe that improving inclusion within their portfolios has the potential to drive meaningful risk-adjusted returns.



WE SPENT 12+ MONTHS COLLABORATING WITH EXPERTS & STANDARD SETTERS TO CREATE A SET OF INCLUSION METRICS FOR ADOPTION IN 2022

The **ILN-Diversio Inclusion Metrics™** are designed to capture leading indicators of organizations that have created an environment where employees are productive and engaged. They can be adapted for different investment processes and priorities across industries and geographies, and by organizations of all sizes.

FUNDAMENTAL METRICS

- Policy and governance
- Talent acquisition strategy
- Employee engagement
- Data transparency
- Third-party verification

ADVANCED METRICS

- Inclusive culture
- Fair management
- Career development
- Workplace flexibility
- Workplace safety
- Turnover and advancement

PUTTING THE PLAYBOOK TO WORK

Ontario Teachers' Pension Plan, Ardian and OMERS are using the metrics to collect inclusion data from portfolio companies and benchmark their performance.

Caisse de dépôt et placement du Québec is using the metrics to measure inclusion risks associated with specific external managers.

State Street Global Advisors is using the metrics and associated business case to support conversations with large companies in their portfolio.



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