

# JEDI Investing: Questions by Investment Stage

The following set of questions are meant to guide those working in private capital markets (VC/PE/private debt). It is not meant to be an exhaustive list, but should help to refine your JEDI investing process or provide strategic support to allocators at different stages.



**\*Also see our [due diligence database](#)**

## STRATEGY

- Does the investment strategy have an explicit focus on gender and racial/ethnic equality?
- Does the strategy include the ability to implement a gender and JEDI lens?
- How widely/narrowly defined is the JEDI lens? (workplace equity, leadership, supporting an inclusive value chain?, etc)
- How well codified is the JEDI lens in the investment policy and other related documents?

## DUE DILIGENCE\*

- Where is JEDI being applied: workplace, leadership, entrepreneurs, value chain?
- How core is the JEDI lens to the investment process/screening?
- Are specific go/no-go decision points centred on meeting minimum gender and JEDI thresholds?
- How well have the needs of impacted communities been considered in the decision-making process?

## PRE-INVESTMENT SELECTION AND PIPELINE

- Has there been a research process/needs assessment to understand the social context in which investable solutions exist?
- Have local communities, experts and other social justice actors been included in the design process?
- Is the deal flow and pipeline gender and JEDI-inclusive?
- How actively are specific opportunities being sought? (eg BIPOC businesses)

## NEGOTIATING AND CLOSING

- How is diversity on investee teams and boards valued or considered?
- Is there an action plan for cultivating more diverse representation?
- Have specific investment terms been negotiated to incentivise outcomes?
- Are there policies, reporting requirements, or other action plans in side letters?
- Are capital injections tied to meeting gender and JEDI milestones?

## SCREENING

- Are there screens in the investment process to avoid extractive investments or those that have a history of exploiting marginalised or disadvantaged communities?
- How core is the JEDI lens to the investment process?
- Is the JEDI lens integrated or intentional?
- How well versed is the investment team in assessing opportunities with a gender and JEDI lens?

## POST-INVESTMENT SUPPORT

- What support can be offered to portfolio companies to improve risk management and JEDI impact?
- As equity investors with board seats, how is the gender and JEDI strategy being reinforced?
- If a JEDI action plan was mapped out, how is progress being measured/acted upon?