



# Diversity, Equity & Inclusion Guidebook

*To create an environment where diversity and inclusion are sustainable through representation, creativity, and innovation within the multifamily industry.*



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# Executive Summary

## Task a Leadership Group

Build a governance team and empower them to hold the entire organization accountable.

## Outline the Framework

Create a Mission Statement and definitions for your DEI group, including the terminology you will use.

## Gather your Metrics and Milestones

Learn about your current demographics, both internally and externally (job candidates, vendors, partnering organizations, etc.)

## Evaluate Areas of Concern

Use your data to identify areas for improvement throughout the organization.

## Track Objectives and Plans to Achieve Goals

Create measurable and attainable goals that address the issues identified above.

## Hooray! The Program is in Place

Communicate the goals and plans broadly, and make sure to preach accountability.

## Execute, Monitor, Assess, Adjust

Put the new plans into motion and monitor your progress. Do NOT be afraid to make adjustments and corrections as needed.

## Rejoice and Remember

It's important to celebrate progress and victories. Success breeds success, and continual promotion of successes will encourage more participation.

# Executive Summary

In 2020, the Atlanta Apartment Association formed a Diversity, Equity, & Inclusion (DEI) subcommittee to address societal concerns, specifically concerning access to resources and opportunities for traditionally underserved populations and people groups. Months of meetings and conversations revealed that the topic and need for the topic is extremely vast and difficult to define. The leadership team soon determined that these same conversations and discussions were likely needed throughout the AAA membership. While allowing that many AAA members are likely managing active programs to address the complex issues of DEI, the supposition is that many companies had nascent programs or had yet to begin digesting the issues.

AAA's DEI leadership decided to produce a reference, available to all member companies, a 'how-to' guide, designed to provide a suggested roadmap for creating, or updating, DEI programs with member firms. This guide is not a set of answers – results and outcomes may vary from company-to-company. This is a series of suggested questions, resources, and discussion points designed to help our member companies self-assess and create plans for the future.

## A DEI Program is NOT

- A 'check-the-box' solution. DEI programs created without sincere interest in the desired outcomes can be seen as shallow and only being entertained for optical reasons.
- A quick fix. Programs created hastily can miss important details or worse, leave constituencies out of the planning.
- For one person, committee, or department. For the best chances at success, an initiative like this must be ingrained throughout the organization, from top to bottom.
- One size fits all. Every organization is unique, and corporate culture can vary widely from one company to the next. It is dangerous to assume that what works or doesn't work at one place will have the same results at another.
- Written in stone. Don't be afraid to change course based on unforeseen changes (either public or internal to the organization).

## A DEI Program IS

- Evergreen. This is a cultural shift, not a race with a finish line.
- Far-reaching. DEI programs should welcome feedback and participation from a very wide constituency, both internal and external, to give the best chances for broad-based buy-in.
- Accountable. Set metrics, goals, etc. Track the progress and adjust as necessary.



# STEP 1 - Create a Leadership Group

## Build a Governance Team

- Include top leadership – make sure the group is empowered to enact true transformation. Top level leaders can:
  - Help overcome obstacles and provide logistical support
  - Model the behavior throughout, providing an important philosophical endorsement
  - Serve as ambassadors – internally and with the public
- Include all levels of the organization. If it's just C-suite people; those at entry-level positions will not feel heard, and efforts could become antagonistic creating an “Us” vs “Them” mentality
- Invite people who can make an impact.
  - Decision makers
  - Influencers
  - Naysayers – nothing is more powerful than the skeptic who becomes an advocate
- Encourage participation from a diverse and broad range of peoples.
  - Top level through entry level.
  - All departments
  - Differing perspectives and backgrounds
- There is no ideal number of participants. But the team should be large enough to be truly diverse and representative, while not being so large as to impede decision-making and consensus building.
- An alternative to be self-led is hiring a DEI specialist to manage the program. On one hand, this brings an outside perspective from an expert in the field and mitigates perceived bias in the goal-setting process. On the other hand, an outsider lacks institutional knowledge, especially related to potential obstacles, and could also show a lack of ownership among company leaders.

## Accountability

Once the leadership team is in place, it is vital to determine how the leadership team and company leadership will be held accountable for supporting the proposed actions and tasks. Leaders should be expected to:

- Fully support the initiatives (verbally, consistently, financially). Anything less than full and sincere support will give the impression that the efforts are simply for optics and not intended for real change.
- Listen to stakeholders. These should be open discussions with opportunity for all constituencies to share and be heard.
- Provide and attend training exercises. Leaders lead by example.
- Encourage global buy-in. True change happens when an entire group participates in and believes in a mission.

# STEP 2 - Definitions

The team is now in place, and it is time to build the framework for the work that is to come. When creating new programs and initiatives, it is necessary to, as Simon Sinek put it, 'Start With the Why.' Why are we doing this? Why is this important?

You cannot develop your 'What' and your How' without first developing your 'Why'. In business terms, this is typically referred to as the Mission and Vision. In terms of Diversity, Equity, and Inclusion, each organization should invest significant time defining the Mission and Vision of the group, as well as each individual term: Diversity – Equity – Inclusion.

In the case of the Atlanta Apartment Association, that group developed the following definitions for each term. NOTE: these are provided as examples only. Each company is strongly encouraged to develop definitions for each that align with each specific organization.

## Atlanta Apartment Association Diversity, Equity, and Inclusion

**MISSION** – To create an environment where diversity and inclusion are sustainable through representation, creativity, and innovation within the multifamily industry.

**VISION/ VALUES:**

- To include diversity, equity, and inclusion practices at the center of our daily work.
- Commitment to using these practices in our daily work.

**DIVERSITY** is a group of people who are different in the same place. These characteristics could be everything that makes us unique, including but not limited to our cognitive skills and personality traits, along with the things that shape our identity.

**EQUITY** - Promoting the same fair treatment, access, opportunity, and advancement for all people, while also striving to identify and eliminate barriers that have prevented the full participation of some groups.

**INCLUSION** is involvement and empowerment where the inherent worth and dignity of all people are recognized.

**KEY QUESTIONS TO CONSIDER:**

- Why is this process and the resulting action important?
- How would the organization be different if this is fully implemented?
- Is the Vision realistic?
- Where do we want to be in 1 year; 5 years; 10 years ... ?

# STEP 3 - Identify Metrics & Set Benchmarks

With any initiative, it is imperative to create metrics, guides, and milestones. The first step is to determine what metrics to track. Here are some potential data points that could be considered as part of your mix (you may use all, some, none of these and could develop many more):

- Diversity of job applicants
- Diversity of the hiring panel/ managers
- Accessibility in the workplace
  - Restrooms
  - Physical disabilities
  - Paternity and maternity leave
  - Recognition of all cultural holidays
- Analysis of employee retention/ turnover
- Diversity in promotions and corporate growth
- Job satisfaction surveys
- Supplier/ vendor diversity
- Diversity in promotions and corporate growth

Demographic data can include (but is not limited to):

- Age
- Disability
- Ethnicity/national origin
- Family status
- Gender
- Gender identity or expression
- Generation
- Language
- Life experiences
- Organization function and level.
- Personality type.
- Physical characteristics.
- Race.
- Religion, belief, and spirituality.
- Sexual orientation.
- Thinking/learning styles.
- Veteran status

This self-assessment portion of the planning can be a very painful process. Often, companies will discover a culture or corporate makeup that is less inclusive than it had seemed. When faced with harsh realities, leadership cannot ignore the findings out of pride or embarrassment. The status quo is what it is and realizing where your organization is at present can be very eye-opening and sobering. However, the process in setting these initial benchmarks is extremely important and is the foundation that will allow impactful goals and plans to develop and grow.

An organizational assessment should consider and review the following: (Note – this is an ongoing process, not something that is done at the beginning and set in stone.)

# STEP 3 - Identify Metrics & Set Benchmarks Continued

## Mission, Vision, and Value Statements

Make sure that the corporate statements do not conflict and are in alignment with the DEI statements that have been created. Everything that an organization works for should work within the Mission and Vision. A statement that conflicts with the DEI messaging could derail the planning before it gets started.

## Organizational Readiness

Are the CEO, mid-level manager, and entry-level staffers engaged in this work and ready to effect change? A phenomenal plan in the hands of a company not yet ready to embrace it is doomed to failure.

## Organizational Assessment

- Set benchmarks for the above data points to understand the current situation
- Compare these numbers with similar groups in your market and with peer organizations in other markets.
- Review company policies and procedures to find areas to address during the DEI planning
- Review corporate decision-making procedures



# STEP 4 - Identify Areas of Concern

After the potentially difficult inward reflection on the current state of the organization, the next step is to identify the areas of concern. What are the concerning statistics, practices, etc. that should be addressed or changed? What barriers exist for potentially marginalized people groups?

Some examples to start with include:

- **Employee Referral Programs** - Employee referrals can encourage people to only refer people who are very similar in makeup to themselves. While it can create a good atmosphere for people who are like-minded and with similar backgrounds, it can also create an environment that appears hostile to people with differing backgrounds.
- **Unconscious Biases** - It may be necessary to educate existing employees, volunteers, and others on the concept of unconscious bias. These are stereotypes that exist within each of us but outside our conscious awareness. Highlighting this concept and encouraging introspection amongst the entire team can break down massive DEI barriers, both for individuals and the organization as a whole.
- **Company Culture** - Does your company only recognize Christmas and Easter? Is it apparent that most people are pro-choice? Do leaders openly lobby for candidates from one political party? These factors and many more, while not overtly exclusionary, can create an atmosphere that appears opposed to differing viewpoints, or is at least intolerant.

# STEP 5 - Set Goals and Action Plans to Achieve Goals

All of the planning work is now done, and it is time to craft goals, action steps, plans, policies, procedures, etc. Make sure that you always keep both the company's overarching Mission and Vision in mind, as well as those of the DEI initiative; these goals and actions then become an enhancement of the overall company's plans.

This is also the stage when every member of the company will start to learn about the specific plans and actions to come. It can be very powerful, especially at the formative stages, to develop some quick and very public wins. This shows that the work is not just lip service, and that substantive and important changes are coming. Some companies find it valuable to have an internal website, intranet page, or visible metrics tracking documents to promote full transparency and accountability.

## SMART Goals

When setting goals and action plans, make sure that they are SMART:

- **Specific** - Instead of "Offer unconscious bias training," try to be more specific with something like, "Offer quarterly unconscious bias training with a goal of all employees participating by June 30."
- **Measurable** - If a goal is left without true metrics, it can be subjective and difficult to truly determine if it's been met. Specific metrics can be tracked and offer milestones and targets.
- **Achievable** - This concept can be the most difficult to maintain. When there are new initiatives being constructed, sheer excitement about the work can lead to unrealistic goals. Unrealistic (and therefore, unmet) goals can doom the entire program. Make sure that the goals are realistic; once met, the bar can be raised to new heights.
- **Relevant** - Stick to the Mission and Vision! Each goal and action item should directly impact the success of the plan.
- **Timely** - When possible, give a realistic timeframe for completion of the goal and underlying actions. Without a proposed finish line, the work can be met with procrastination. Real and firm deadlines create a sense of urgency.

## Draft Your DEI Policies

Setting firm and consistent DEI policies inculcates the ideals throughout the corporate structure and culture, ensuring that all constituencies, both internal and external, understand the value the organization places on DEI.

# STEP 5 - Set Goals and Action Plans to Achieve Goals Continued

Your DEI Policy may include:

- Mission, Vision, and definition of terms (developed in Step 2 above.)
- Expectations. Let everyone know how to navigate the 'new normal' that has been created for the
- organization's culture.
- Freedom and flexibility to question. All employees should feel empowered to ask questions, suggest improvements, recommend training opportunities, and to report perceived issues.
- Reiterate the involvement and buy-in from all levels of the company. This cannot be overstated.
- Any standards your company will develop, change, or eliminate to ensure safe and thoughtful environment

## STEP 6 - Communicate BROADLY

The best way to destroy momentum and promote program failure is to keep it secret. If this is truly meant to be a corporate shift, every single stakeholder needs to know what is happening, how it's going to happen, and the leaders that are working to ensure it will happen. You will likely find that those not involved with the planning will volunteer to help as needed once they see the sincere work that has been undertaken.

It is not enough to send a memo to all employees and let them know what has been planned. Consistent communications in many forms will provide the highest likelihood that the message will be loudly and clearly shared with everyone. Examples of communications vehicles:

- Town hall meeting to introduce the plan and invite discussion
- Periodic updates in internal email newsletters or other communications. Provide updates on progress, successes, and yes – failures.
- Video messages to employees highlighting certain milestones
- Hand-written notes to employees, thanking them for their work
- Internal company website with dashboards, metrics, and up-to-the-minute reporting
- Infographics posted throughout the workplace, illustrating the new policies
- If comfortable with a public campaign, let the social media world know what the company is doing as well
- Success stories and video testimonials can be very powerful reminders of the reasons for this planning. And they certainly motivate people to keep the work going.

It's important to remember that it is incumbent upon all members of the leadership team to communicate early and often. This is not just the job of C-suite executives (although their sincere, vocal support is highly beneficial!) Empower a wide audience to communicate with an even wider audience for the best chances at full buy-in.

# STEP 7 - Implement, Monitor, Assess, Adjust

## Implement

When it's time to unleash this plan, consider the timing of when the goals and actions will happen. The excitement of the release can lead to an attempt to accomplish too much at once. The result of this type of effort is often burnout and very little success. Too many people trying to accomplish too many things at the same time can lead to disaster. Instead, consider phasing the goals in over a period of time. A few things will happen as a result. First, you should plan some quick wins toward the beginning of the launch. Seeing immediate success will invigorate the company and build very quick momentum. Also, steady progress gives the appearance of a prolonged effort, not just a checked box. Consider the optics of a) several goals celebrated in the first month and then nothing else for the next six months versus b) a new accomplishment or goal achieved and communicated once every three weeks for a six-month period.

## Monitor and Measure

You identified the data to watch early in the planning process. You then developed the goals and plans that were created to make substantive change. The only way to see if the goals and plans that you developed are working is to continually track progress. You could find that the plans and goals, although successfully implemented, did not move the needle on the metrics you're tracking.

Keep in mind that the point of this entire undertaking is not to check the box next to the goals and action steps. The goal is to enact change and create an environment that respects all peoples. Do not get mired in the race to fulfill what is in the plan while losing site of the real goal. If the work is not bringing the intended results, it could be time to re-evaluate and make mid-course corrections.

## Review and Adjust

It is highly unlikely that every plan designed by the group will hit every goal and positively affect every metric. No one is that good at planning! As the continual monitoring will show, changes will be inevitable. Please know that this is expected and a mature part of the growth process. None of the plans should be considered static. The review and update process should never end and should always be structured to drive the goals toward the overarching mission. Even if the plans are working exactly as hoped, there could be societal changes that arise unexpectedly and require sometimes drastic changes. Never lose site of the mission!



## STEP 8 - CELEBRATE Continually

This is the easiest part of any planning process. This is the most exciting part of any planning process. It is also the most overlooked and forgotten part of the planning process! Celebrate! Victories and accomplishments, large or small, are very important in the lifespan of a plan and they should be celebrated accordingly.

Celebrating victories can:

- Create momentum. As mentioned above, accomplishments energize the employees and show that the commitment is paying off with real progress.
- Thank the organizers. Let's be honest. No one volunteered on this planning group so that they could feel good and receive corporate kudos. However, it's always nice to receive thanks when seeing your hard work come to fruition.
- Send a message externally. Your celebrations will be heard outside the walls of the company. Successes will be felt and appreciated with vendors, peers, and other groups, potentially encouraging them to initiate a similar planning process.

Take a deep breath and celebrate before rushing off to the next goal.

## APPENDIX

*The following pages consist of a series of case studies from real-life experiences from AAA member companies. These are provided as a resource by the member to accompany this guide. The Atlanta Apartment Association does not endorse any company over another, nor does it suggest that these examples should be followed as part of your work. We provide these as a resource to learn from the experience of other companies undertaking a similar journey.*

# Visit to National Center for Civil and Human Rights



## How

Atlanta based properties - field trip

- TMG Case Study
  - This is great activity for office, maintenance, and corporate teams
- Teams arrives at the Center for Civil and Human Rights
  - Engage a guide who gives an overview
  - Team explores the 3-4 sections of museum on their own and set a time to meet and exit
  - Tickets are around \$20/head
- Team walks to a local restaurant for lunch
- Facilitate a guided discussion at lunch

## Resources

- [Center Overview](#)
- [Excellent short video, "What are universal human rights? - Benedetta Berti"](#)

## Note

- After a visit to the Center for Civil and Human Rights, be ready for strong emotions. The facilitator should pre-visit the museum and engage with all exhibits; especially the lunch counter and bus ride. Facilitator should be ready with questions at lunch:
- What stood out to you?
- How are you feeling?
- We learned that there are Civil AND Human Rights. After reviewing the Human Rights abuse around the world, how do you feel about our country's response?
- Facilitator should speak to the company's commitment to non-discrimination and review categories in handbook; and—explain the process to engage with a supervisor/HR if there is possible concern. Listen – this is a good time to listen to team members.
- NOTE – strongly encourage to do lunch after for the discussion because when you leave the museum there is a need to “unpack” the emotions stirred, and as a well-facilitated group dialogue it will be a healthy experience.

# Team Movie Event



## How

- Set a deadline for team to watch
- Set a Zoom or Teams meeting for team dialogue after watching
- 2 ways to execute:
  - Option 1: Each Team Member watches the movie on their own. May have to rent on Apple TV (Manager reimbursed with petty cash).
  - Option 2: Watch at each community/office as a team, in the office

## Resources

- There are some guides you can download online (around \$4.99) for discussion. [View this example here.](#)

## Note

- This was a powerful experience and it is recommended to take the posture of listening, not trying to solve problems or respond to every comment, but listening to other experiences. Encourage use of “I” statements.
- Sample prompting questions (if you don’t download a specific guide):
  - What was the theme of the movie?
  - Did you learn anything from this movie?
  - Did anything surprise you in the movie?
  - What was your favorite and least favorite character in the movie? Why?
  - What is your overall opinion of the movie?
- Wrap up discussion with “Call to Action,” statements:
  - What are 2 things you will do differently as a result of this experience?
  - Who will you share with, the insights you’ve learned today?
  - Etc.

# Team Movie Event



## How

- Set a deadline for team to watch
- Set a Zoom or Teams meeting for team dialogue after watching
- 3 ways to execute:
  - Option 1: Each Team Member watches the movie on their own. May have to rent on Amazon for \$2.99 (Manager reimbursed with petty cash).
  - Option 2: Amazon has a feature called "Watch Party." Where you can all watch and chat together.
  - Option 3: Watch at each community/office as a team, in the office

## Note

- This was a powerful experience and it is recommended to take the posture of listening, not trying to solve problems or respond to every comment, but listening to other experiences. Encourage use of "I" statements.
  - Wrap up discussion with "Call to Action," statements: What are 2 things you will do differently as a result of this experience?
  - Who will you share with, the insights you've learned today? Etc.



# Unconscious Bias Training/Discussion



## How

- Engage all Team Members to watch video and/or take course on Unconscious Bias
  - TMG Case Study
    - TMG Team took the Unconscious Bias Course
      - We went through NAA's Visto site, to take this course (by Franklin Covey): <https://store.gowithvisto.org/collections/courses/products/unconscious-bias-understanding-bias-to-unleash-potential>
      - It is pricey, but an excellent course
        - Cost: \$186/course
      - Sometimes NAA offers it for FREE or local associations offer it for FREE
  - Option 2: Free Unconscious Bias Training Course:
    - <https://www.nonprofitready.org/unconscious-bias-training>
  - Option 3: Free YouTube videos (many are excellent)
    - [TED TALKS LIVE Short - Unconscious Bias](#) (3 minutes)
    - [What is Unconscious Bias?](#) (3 minutes)
    - [How to check your unconscious bias - Dr Jennifer Eberhardt](#) (8 minutes)
    - [How to Outsmart Your Own Unconscious Bias | Valerie Alexander](#) (17 minutes)

## Resources

- Read about Unconscious Bias – assign an article or two – or leave it open for Team Member to find an article to present about Unconscious Bias. Examples:
  - [16 Unconscious Bias Examples and How to Avoid Them in the Workplace](#)
  - [Unconscious bias—what it is and how to overcome it](#)

## Note

- Facilitator should take the NAA Visto Franklin Covey course above, at a minimum; and watch the 17 minute Ted Talk above.
  - Develop questions
    - What is Unconscious Bias?
    - What are some examples of Unconscious Bias?
    - How can we combat Unconscious Bias in our workplace?
    - Who can we alert within our team about possible situations that need attention?

# Unconscious Bias Training/Discussion

## How

- Atlanta based properties - field trip
  - TMG Case Study
    - Pre-announced and closed offices at 11 am
  - This is great activity for office, maintenance, and corporate teams
    - Team arrives at King Center
  - Walking tour path marked and self guided starting from King Center
    - Cost: FREE
    - Facilitate a guided discussion at King Center Reflecting Pool

## Resources

- [Center Overview](#)
  - Engage Team Members to watch/listen to the “[I Have a Dream Speech,](#)” BEFORE the visit (it’s 6 minutes 46 seconds)

## Note

- After a visit to Freedom Hall, be ready for strong emotions. The facilitator should pre-visit the museum and engage with all exhibits and identify a place for a guided discussion before lunch. Facilitator should be ready with questions at lunch:
  - What stood out to you?
  - How are you feeling?
  - What does Non-Violent Social Change mean to you?
  - How did Dr King use the message of Non-Violence in his fight?
  - Why is Historic Ebenezer Baptist Church important to the Civil Rights Movement?
- Facilitator should speak to the company’s commitment to non-discrimination and review categories in handbook; and—explain the process to engage with a supervisor/HR if there is possible concern.
  - Listen – this is a good time to listen to team members.
  - NOTE – strongly encourage to do lunch after for the guided discussion at the Reflection Pool



# Women's Leadership Group

## How

- TMG case Study
  - Started group during pandemic, via TEAMS – all digital
  - Group meets 5-6 times per year
  - Define WHY this group is important:
    - Equity and Inclusion
    - Give a safe space for female Team Members to voice concerns
    - Hold our company accountable with: Management decisions, promotions, transparency
    - C-Suite/Corporate Leaders support this group publicly
  - Engage/invite all females to join the first meeting. Attendance is purely optional. Schedule meeting mid-day – at lunch or early afternoon
  - Encourage Managers to make space, give time for Team Members who chose to engage
- Invite a speaker for each call for guided interview. Pre-send questions to speaker. For example:
  - Tell us your story and your career growth
  - Who believed in you and made a difference in your career? What advice do you have to share with our ladies on this call?
- Prepare for meeting by having a gift for each Team Member to open during the call
  - Gratitude Journal
  - Little Words Project (solicit one word from team members before the all that speaks to them right now)

## Resources

- [Little Words Project](#)
- [Multifamily Women Summit 2023](#)
- [Gratitude Journal - Amazon](#)

## Note

- **Gratitude** - During the first call, which should last one hour, facilitator can study, watch a few videos on gratitude, and go around and have everyone speak about something you are grateful for – today
  - Team then opens gift – The Gratitude Journal (link above)

# Women's Leadership Group Continued

- **Tiny Words Project** - This is unique bracelet where Team Members select a word that speaks to them, and facilitator orders the word bracelet and ships to each team member – to open at next meeting. Have each team member show bracelet and explain what the word means to them and why they chose it. What's unique is that each bracelet has a serial number and you can go on the website and write your story or how the word spoke to you; as they encourage you to give the bracelet away after you are "done" with that word. The new recipient can go online and look up the number and read the bracelet's history and stories.
- **Object on Desk** - during a call, ask each team member to share one object that is on their desk. Show it on camera and have them explain why it's important. Be ready for tears. It's a special sharing moment. This creates bonding among team members
- **Multifamily Women's Summit** - It is very important that the facilitator attend this annual event. This will help with future Women's Leadership Group meetings. Corporate Leadership should support facilitator by sending to this important annual seminar.
- **Speakers** - When facilitator engages speakers, look inward first. Is your CEO/President/Controller female? Why not interview them on the call. Look at vendors (leaders at the ILS's, any vendor who is female and owner of their business, Regional Managers at other PMC's.

