NMHC DIVERSITY EQUITY & INCLUSION TOOLKIT

EXECUTING AN ORGANIZATIONAL COMMITMENT

NMHC.ORG/DEITOOLKIT

NATIONAL MULTIFAMILY HOUSING COUNCIL

CONTENTS

The information provided herein is general in nature and is not intended to be legal advice. It is designed to assist our members in understanding this issue area, but it is not intended to address specific fact circumstances or business situations. For specific legal advice, consult your attorney.

About NMHC

Based in Washington, DC, the National Multifamily Housing Council (NMHC) is a national association representing the interests of the larger and most prominent apartment firms in the U.S. NMHC's members are the principal officers of firms engaged in all aspects of the apartment industry, including ownership, development, management and financing. NMHC advocates on behalf of rental housing, conducts apartment-related research, encourages the exchange of strategic business information and promotes the desirability of apartment living. Nearly one-third of Americans rent their housing, and almost 15 percent live in an apartment (defined here as a building with five or more units). For more information, contact NMHC at 202/974-2300, email the Council at info@nmhc.org, or visit NMHC's website at www.nmhc.org.

About NMHC's DEI Commitment

NMHC's long-term commitment to Diversity, Equity and Inclusion (DEI) promotes DEI as a business imperative that drives innovation and success. NMHC highlights best practices, provides resources and leverages strategic partnerships to help our members create diverse, equitable and inclusive organizations where talent and the communities they help build will thrive.

About The Cee Suite

The Cee Suite is a certified minority- and woman-owned talent & DEI consultancy founded in 2017. Through its work, The Cee Suite promotes social progress by partnering with clients on strategic and people-centered advisory, people and talent strategies, and learning and coaching partnerships. The Cee Suite serves multiple industries, including multi-family and real estate investment companies committed to developing high-performing, equitable and inclusive workplaces. For more information, contact The Cee Suite at admin@lifeintheceesuite.com or visit The Cee Suite's website at www.lifeintheceesuite.com.

SECTION 1

SETTING THE STAGE

INTRODUCTION

Nearly 40 million Americans are building their lives in apartment homes. The apartment industry recognizes the value of building a workforce that reflects the diversity of the residents we serve and the communities where we operate. Cultivating an organizational culture that prioritizes diversity, equity and inclusion (DEI) is a strategic imperative. NMHC members have asked for resources to support their DEI goals, and, in response, NMHC offers this member-informed toolkit to meet apartment firms where they are.

Benchmarking Industry Needs

NMHC and The Cee Suite, a minority- and woman-owned talent management consultancy specializing in DEI, surveyed NMHC members to understand apartment firms' challenges in making DEI progress.

The survey explored four core areas:

DEI Organizational Commitment	**Talent Practices**
Accountability & Measurement	**Business & Governance**

Fully 150 firms participated in the survey, and overall, respondents saw opportunities to improve their organization's DEI practices regardless of a firm's size, ownership structure or current phase in its DEI journey. The survey results also indicated strong industry support for embedding DEI into organizational practices, with 60% of respondents saying their firm had an existing DEI commitment and vision. However, only 40% indicated they had DEI-aligned talent practices covering hiring, development and succession planning. Accordingly, respondents reported a strong desire for tools and resources that could be used to develop and advance their strategy. This toolkit responds to those needs.

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Toolkit Overview

This toolkit provides a five-stage process any organization can follow to embed DEI internally within its talent ecosystem and externally through supplier diversity efforts:

1. Developing a DEI philosophy and commitment
2. Assembling a change management team
3. Conducting an internal assessment of existing policies, processes, practices and norms to determine gaps between existing efforts and stated goals
4. Designing targeted and data informed solutions
5. Measuring and making adjustments to help ensure progress for underrepresented or marginalized groups

The toolkit recognizes that there is no one-size-fits-all approach to an effective DEI strategy for multifamily organizations as they differ in size, business priorities, cultures and degree of progress in DEI. It also acknowledges that progress may not be linear. For example, firms may be further along with an equitable and inclusive learning and development strategy but starting from scratch with the hiring process.

The toolkit's modular design makes it easy for organizations to jump in where it makes sense for them and directly access the tools and recommendations for their respective stage of the DEI Continuum:

- Establishing: just starting to lay the foundation for DEI
- Growing: looking to build on current strengths of your strategy
- Leading: ready to influence more significant change internally and externally

How to Use the Toolkit

Regardless of where an organization is in its DEI journey, they are encouraged to begin by gaining a comprehensive understanding of the DEI continuum in Section 2.

Section 2 also helps firms just starting the DEI journey to determine a DEI philosophy and vision and understand who to engage in that process. Firms may also have different approaches to roles and accountability, and Section 2 outlines some options to help put together change management teams.

Section 3 provides a variety of tools and solutions at each stage of the continuum (i.e., Establish, Grow, Lead) to help firms embed DEI into their operations, including:

DEI Engagement Strategies	**Recruiting and Hiring**
Learning and Development	**Supplier Diversity**
Performance Management	**Measure and Adjust: Organization Accountability**

While the DEI continuum will help firms identify the place to start their efforts, they are encouraged to first conduct a comprehensive DEI assessment or audit. An audit ***(See Tool #5: Organization DEI Assessment Guide)*** will help them determine precisely what is going on in their operations, where there are opportunities for intervention and, thus, which tools and resources are best for them.

We hope you find this toolkit a valuable addition to NMHC's long-standing commitment to DEI as a business strategy to benefit the entire apartment industry.

Regardless of where an organization is in its DEI journey, they are encouraged to begin by gaining a comprehensive understanding of the DEI continuum in Section 2.

SECTION 2

CHARACTERISTICS OF A DIVERSE, EQUITABLE AND INCLUSIVE ORGANIZATION

INTRODUCTION

There is no one-size-fits-all approach to an effective DEI strategy for multifamily organizations because they differ in size, business priorities, goals, and cultures. There are, however, foundational principles shared by all firms committed to this work. All DEI strategies should:

- Commit to addressing exclusion and discrimination within the organization, including racism, sexism, heterosexism, ageism, classism, ableism and religious bias.
- Position DEI as a critical business imperative. As such, it should have the same level of criticality and accountability as other business verticals/strategic objectives in the organization. Similarly, it should have goals, strategies, resources, budget and key performance indicators (KPI) like other key business verticals.
- Involve all parts of the organization. DEI should not be the responsibility of one position or team. It should not be viewed as an "extracurricular" activity. DEI is a values and mindset strategy for solving business goals, and it should be embedded in every part of an organization's operations. Executive leadership, human resources/talent, marketing and corporate social responsibility teams are essential to change and ongoing execution, and each should lead accordingly. Committed organizations also ensure the chief executive and leadership team support a clear vision and commitment to DEI.
- Value and develop workforce contributions and talents. Organizations that regularly question "whose perspective is missing?" ensure diverse viewpoints are represented as decisions are made.
- Formalize organizational change principles and practices, including a cohesive and ongoing communication strategy that encompasses everyone's perspectives.
- Courageously ask hard questions to evaluate organizational practices and norms with an openness to change throughout the organization's DEI journey.

INTRODUCTION TO THE DEI CONTINUUM

There are many opportunities to create more diverse, equitable and inclusive workplaces, but committed organizations must first understand where they are on the DEI Continuum. ***(See Table B)***

Understanding an organization's stage will help determine which resources in this toolkit will be most beneficial. This toolkit uses three stages of a DEI journey to help firms determine the most relevant tools and guidance. They are:

- *Establishing*: Starting to lay the foundation.
- *Growing*: Looking to build on the current strengths of your strategy.
- *Leading*: Ready for more significant change within your organization's operations and beyond.

Firms should recognize that they may not be at the same stage for *all* of their DEI work. For instance, a firm may be "leading" in some areas but "establishing" in others. This toolkit's modular approach allows users to identify the appropriate tools for their needs and priorities in every element of their DEI program.

The modular approach to this toolkit will allow you to find 'establishing', 'growing', and 'leading' tools and ideas across a number of different talent, business, and external priorities.

Table B

THE DIVERSITY, EQUITY AND INCLUSION CONTINUUM

	STAGES OF DEI DEVELOPMENT		
	Establishing	**Growing**	**Leading**
PHILOSOPHY & COMMITMENT	A formal commitment has not yet been created or shared as part of an organization's values or independent of those values.	A formal commitment has been created and shared, but the organization is still working to fully actualize it.	A formal commitment is in place and has been communicated broadly. The commitment is visibly championed and driven by the organization's leaders. Commitment is incorporated into the culture as an important organizational value.
CHANGE MANAGEMENT TEAM	There is no change team or DEI council in place.	A cross-functional change team or DEI council is in place, but has had mixed results. The team may need to evaluate its efficacy and approach, including its membership.	The change team or DEI council is on track to achieve several of the organization's goals over a sustained period. The team is accountable and preparing to engage or already has engaged external partners.
ASSESSMENT	The organization hasn't formally assessed the impact of its practices and norms on internal teams and external partners. The organization may be unsure where to begin its DEI journey.	The organization has not regularly or recently assessed the impact of its practices and norms on internal teams and external partners, including the efficacy of its existing DEI initiatives. The organization may be unsure where to make adjustments.	The organization has regularly and recently assessed the impact of its practices and norms, including the efficacy of its existing DEI initiatives and efforts on internal teams and external partners. The organization clearly understands its strengths and areas needing intervention.
SOLUTION DESIGN & IMPLEMENTATION			
DEI ENGAGEMENT	There are few, if any, DEI initiatives or efforts in place. The organization does not programmatically discuss or learn about identities, cultures, histories and their impacts on equity. The organization has not created spaces for underrepresented staff. Little to no budget exists for supporting DEI initiatives or efforts.	There is a DEI leader and/or DEI council to proactively identify opportunities to strengthen DEI within the organization. The organization may have Employee Resource Groups (ERGs) and some opportunities to engage in DEI-relevant learning. Funding for such activities may be discretionary.	The organization has an executive-level DEI leader in place. The organization commits appropriate resources and budgets to its DEI initiatives, councils and ERGs. It measures the efficacy of those activities to identify successes to build upon and opportunities for adjustment.

	STAGES OF DEI DEVELOPMENT		
	Establishing	**Growing**	**Leading**
LEARNING & DEVELOPMENT	Learning and development opportunities are limited or aren't offered equitably. Job competencies and career roadmaps have not been created. There is no succession planning process is not in place.	Learning and development opportunities are offered at a moderate level. Job competencies and career roadmaps may be in place but exist for only some positions and pathways and may be inconsistently applied. The succession planning process may be in place, but it does not intentionally include a review of underrepresented talent and may cover only certain positions.	The organization equitably offers numerous and varied opportunities for learning and development and measures participation to ensure equitable participation. Job competencies and career roadmaps are in place and applied evenly and consistently. The succession planning process is intentionally inclusive and covers most positions.
PERFORMANCE	Formal performance processes or guidelines are not in place or are minimal. There are no job competencies or performance expectations in place. Feedback is limited or not connected to objective criteria.	Formal performance processes and guidelines are in place. Job competencies and performance expectations are referenced, but may not be applied consistently. The impact of outcomes across demographic groups is not monitored.	Formal performance processes and guidelines are in place. Job competencies and performance expectations are consistently referenced and applied. The impact of outcomes across demographic groups is measured.
RECRUITING/ HIRING	There is limited sourcing or outreach to underrepresented groups. Selection criteria are not defined or applied and may disproportionally and unnecessarily impact underrepresented groups. Interview practices are not standardized.	Some hiring goals are in place related to underrepresented groups. The organization may have partners who engage with marginalized communities. Selection criteria and interview practices have some structure, but are inconsistently applied.	Objective analytics inform hiring goals and strategy. Multiple sources of diverse talent pools exist, including schools, partner organizations and an intentionally inclusive referral strategy. Selection criteria and interview practices are standardized and consistently applied across similar positions.
SUPPLIER DIVERSITY	Supplier diversity initiatives are informal, ad hoc or do not exist.	A supplier diversity program framework is in place, but may be too limited in scope, and the execution may be inconsistent or ineffective. Resources and tools to support supplier diversity goals are limited or ineffective. Performance data for supplier diversity program may not exist, are inconsistently referenced or are not used to inform the approach.	A complete supplier diversity program framework is in place, appropriately scoped and consistently executed. Goals and strategies have been established. Resources and tools are in place to support outcomes. The results are measured, reported and used to inform the approach.
ACCOUNTABILITY, MEASUREMENT & ADJUSTMENT	Accountability mechanisms are not in place. Goals are not established. KPIs and timelines for achieving goals have not established.	Some goals are in place, and some KPIs are established, but tracking, reporting and adjustment may be limited or inconsistent.	Goals are in place, and KPIs are established. Activities are fully and consistently tracked and reported to build on or replicate wins and course-correct where the organization has missed the mark.

LAYING THE GROUNDWORK FOR DIVERSITY, EQUITY & INCLUSION

Just as successful organizations commit appropriate resources to achieve their important goals, DEI strategies and programs are no different. DEI depends on engaging positions in multiple functional areas and considering everyone in the organization's roles.

While the executive team, human resources, marketing, corporate social responsibility, finance, procurement and other functional departments may lead the design of this work, progress depends on engaging all functional areas. ***(See "Partnerships within your organization" in the following section.)***

The first step for any DEI work is to determine how much groundwork is already in place in the company, including the readiness of the organization's people. Organizational buy-in requires a strategy that includes information sharing, feedback, learning, coaching and policy implementation. This toolkit provides valuable guidance and tools for addressing an organization's readiness for change.

Firms undertaking this work are encouraged to have a "DEI center of expertise/excellence" or a DEI strategy leader. There are several models for this role that firms may want to consider based on their size and complexity. These models are detailed below, but the key objectives include the following:

- Determining the organization's vision and approach.
- Engaging key decision makers in the process.
- Advising the organization on equity and inclusion policies and practices.
- Making recommendations for the strategic allocation of budgets.
- Tracking progress toward goals.

OPTION 1

Large or complex organizations (i.e., those with multiple lines of business or departments, highly matrixed teams or a decentralized structure) may hire a chief diversity officer (CDO) or DEI lead. This individual should:

- Have experience navigating organizations and influencing key decision makers.
- Understand the business, including both internal and external engagement opportunities.
- Have DEI expertise.
- Know about talent management and talent analytics.

Ideally, a CDO reports to the organization's chief executive and sits on the leadership or executive team. This structure allows the CDO to offer guidance at the outset of important discussions, about how to execute the organization's key business and operational decisions equitably and inclusively. The CDO should be empowered to make critical decisions while working alongside other leaders and key partners. They should also have adequate resources, including a budget and team, just as any other critical function is likely to have to support its success.

OPTION 2

Medium-sized organizations or those with less complex organizational structures and operations may choose to identify a DEI head within the talent management, corporate social responsibility or organizational strategy teams. This position should use its proximity to leaders to help drive accountability and should meet with senior leadership frequently (e.g., on a biweekly or monthly cadence) to discuss goals, strategy and progress.

OPTION 3

Smaller organizations (i.e., those with a headcount under 50) or with few structural complexities may choose to work on their DEI strategies through a DEI council instead of a dedicated position. If a firm pursues this option, one council member should be designated as the chair or lead, even if that seat is rotated.

The council must have a governance structure with clearly defined goals, structure and roles to encourage implementation and accountability. Leadership must communicate to the broader organization that the council has its complete backing and the authority to hold others accountable. The council chair/lead should meet frequently with senior leadership (e.g., on a biweekly or monthly cadence) to discuss progress. ***(See Tool #7: Establishing a DEI Council.)***

Regardless of the approach, firms should first conduct an assessment, as outlined in the "Assessment Section," to help determine their top priorities and develop their strategy. Organizations may have the expertise and resources to execute straightforward tactics independently. There may also be a point where an organization needs expertise or capacity beyond its internal resources. In those cases, firms can consider engaging consultants, facilitators and other organizational partnerships. ***(See Tool #1: Hiring a DEI Consultant.)***

PARTNERSHIPS WITHIN YOUR ORGANIZATION

Embedding DEI throughout an organization requires leadership to be committed and engaged, and there needs to be accountability across various functions and business units. Leadership commitment from the top is mission critical. Without this commitment, securing buy-in across the organization and appropriate resources will be difficult, if not impossible.

Some best practices to consider for leadership commitment and organizational buy-in are as follows:

- Be strategic about how to engage each leader. Survey or assess each leader's level of DEI competence and willingness to champion this work.
- Involve leaders in developing the DEI strategy.
- Strategically include DEI councils or relevant working groups.
- Work with leaders to develop accountability measures and agree on a reporting plan.
- Ensure leaders have the right input and data about the experiences and challenges their most marginalized team members face.

Communications and Marketing Teams

Communications and marketing can play an important role in demonstrating a company's DEI commitment to employees and the broader communities they serve, including residents, prospective employees, clients, suppliers, partners and the public. Many renters, employees, clients, suppliers and partners actively consider a firm's demonstrated DEI commitment in their current or potential interactions.

Getting Communications and Marketing Right

- Start the messaging with input from the organization's leadership and the DEI lead.
- Use benchmarking, surveys, focus groups, interviews and social media to understand the viewpoints of internal and external stakeholders. Include an intentional approach for considering marginalized or underrepresented groups.
- Provide opportunities for your organization's brand managers, DEI professionals and ERGs to collaborate.
- Ensure any communications you publish include accessible and inclusive messaging and technical formats (i.e., different languages, alternative text or options for individuals with disabilities) and comply with applicable laws and regulations.

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Corporate Social Responsibility (CSR)
CSR is a critical part of aligning an organization's internal and external values. CSR is generally viewed as a company's commitment to consider environmental, human rights, philanthropic and economic impact as important parts of its business operations. Traditionally, CSR activities have been broken into four categories: environmental stewardship, employee volunteerism, philanthropy and commitments to protect specific communities.

CSR strategies should also address ethics. Unethical behavior directly impacts employee morale, retention and client relations. Employees and consumers are more likely to believe in a company that operates ethically, practices transparency and treats employees and clients fairly.

How to Connect CSR and DEI.
- Establish CSR initiatives that align with organizational values.
- Involve DEI leaders, DEI councils and ERGs in implementing CSR initiatives, particularly those involving people-focused practices, to ensure that inclusive messaging is used.
- Incorporate CSR in recruitment initiatives (e.g., highlight CSR on the organization's website, job postings, etc.).
- Engage in multiple kinds of CSR programs (e.g., volunteering, community outreach, corporate giving).
- Document, measure and communicate CSR efforts.

Supplier Diversity & Procurement Teams
Supplier diversity is the practice of intentionally expanding an organization's purchasing network to include more minority-, women-, veteran- and LGBTQ-owned vendors, consultants, providers and partners as one means of achieving their CSR and DEI goals. Diversifying suppliers can be difficult for multifamily firms, given their functionally and geographically decentralized purchasing models. However, there are resources available to help.

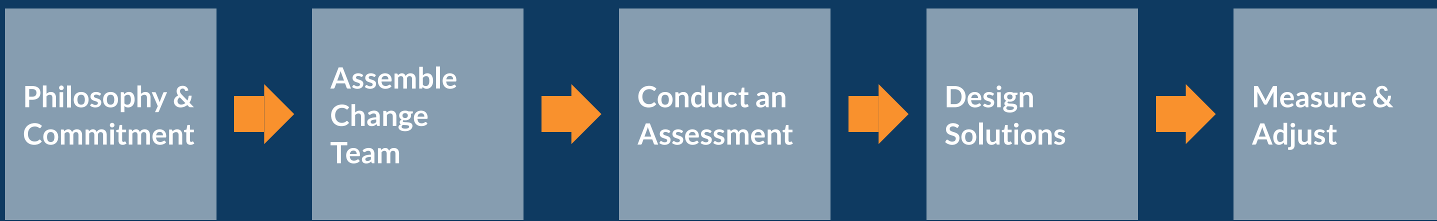
In 2023, NMHC and an alliance of national commercial real estate trade associations launched the Commercial Real Estate Supplier Diversity (CREDS) initiative. CREDS will pilot an online supplier management platform that includes a comprehensive database of diverse suppliers. Organizations that subscribe to the platform can post purchase orders and other contracting opportunities and use the platform to measure and benchmark their spending. Notably, diverse vendors, consultants, providers and other sellers can be listed in the database at no cost. The USGBC and GRESB have also published guides for responsibility in supply chains as part of their certification programs, and other general industry national and local resources are available.

SECTION 3

YOUR ORGANIZATION'S DEI JOURNEY

INTRODUCTION

An organization's DEI journey may include the five key phases below:



DEVELOP/EXPAND PHILOSOPHY & ORGANIZATIONAL COMMITMENT

Overview

An organization's DEI commitment signals its intention and is the foundation for driving change. It sets expectations and creates the accountability needed for progress. A DEI commitment should be both aspirational and achievable by aligning policies, structures, champions and resources.

Developing/Refining Your Organization's DEI Philosophy

Beginning with senior leadership, an organization should explore DEI perspectives to determine its philosophy. The reflection questions tool will help identify leadership DEI priorities, opportunities for intervention and messaging to the organization. ***(See Tool #2: Establish Your DEI Philosophy.)***

Crafting Your Commitment

Firms should also engage a broader team beyond leadership. Focus groups or surveys are good ways to include more voices. Ask team members why DEI matters to them, their workplace experiences, the organization's success and their broader communities. Ask for their vision for DEI within the organization.

If a survey is used, it should include optional demographic questions and, importantly, explain why they are included—the demographic data help ensure the views and experiences of underrepresented groups are not aggregated in the data and are lost. There must be a certain level of trust or confidence that the organization is sincere in its efforts for this approach to be effective.

Use the insights from both the executive and non-executive groups to create a statement of commitment that captures the sentiment and imagination of your team.

ESTABLISH

If an organization is just starting and has yet to determine a DEI philosophy or commitment, it should begin by defining its position on DEI. ***(See Tool #3: Sample DEI Statement.)***

GROW

If an organization has an established DEI commitment, but a self-assessment suggests it has not been embedded in all organizational practices and functional areas, it may help to review and revise the commitment to ensure the following:

- DEI is explicitly communicated as mission critical and connected to the organization's overall strategy to achieve business goals.
- The statement demonstrates the organization's evolution on DEI and its deeper commitment to this work. Incorporate the firm's 'why' and 'why now.'

The organization should consider whether the right people are engaged in executing the vision. Additionally, it's important to examine where past commitments fell short and determine what the organization has learned and how it might use those insights to craft current organizational aspirations. Finally, the firm should be transparent and communicate with staff.

LEAD

If DEI is embedded in all organizational practices across functional areas, and employee feedback indicates the firm's commitment aligns with their workplace experiences (particularly team members from underrepresented demographic groups), there may be additional opportunities to move further. For example, consider using the firm's DEI statement to explicitly advocate for racial equity, share the firm's commitment publicly (alongside any insights and lessons learned) and challenge other organizations and partners to join with similar pledges.

ASSEMBLE A CHANGE MANAGEMENT TEAM

Philosophy & Commitment → **Assemble Change Team** → Conduct an Assessment → Design Solutions → Measure & Adjust

Overview

A DEI statement is just the start. For any statement to have meaning, it needs to be accompanied by policies and practices, measures of progress and accountability and expected and accepted behaviors moving forward. For firms just starting their journey or recommitting to past pledges, the next critical step is to assemble the right people to translate the commitment into a cohesive and actionable strategy.

Readiness and Commitment to Change

Before starting any new initiative, the change management team should assess organizational commitment to change, especially among executives. Key influencers vary, but ideally include the organization's C-suite. Without executive commitment, employees may not value the need for change, believe in the organization's commitment and/or may not be able or willing to do their respective work in the process.

One way to gauge whether key leaders value the need for change enough to commit to implementation is to check in with them with a brief survey or focus group. ***(See Tool #4: Assess Organization's Readiness for Change, which includes survey or focus group questions.)***

Best Practices for Assembling a Change Team

The change management team is instrumental in moving the organization forward at the appropriate pace to adopt meaningful change. For apartment firms, change management teams that include a diverse group of committed individuals across several levels of the organization (strategic, managerial and operational) can better ensure new policies and practices are broadly informed by various perspectives and effectively implemented. Consider including leaders or representatives from the board, human resources/talent, marketing and procurement teams and regional and property management teams.

Best practices are to appoint a lead (or two co-leads) and limit the group size to no more than 12 people. The team may also include an external consultant. The existing responsibilities of the change management team members beyond this work should be adjusted to allow for adequate bandwidth and to demonstrate the importance of the group's efforts as a business priority.

ESTABLISH

If there is no change management team in place (or a DEI council that can serve as a change management team), use ***Tool #7: Establishing a DEI Council*** to consider how to assemble a group.

The team should be carefully selected and, to the extent possible, represent the actual and aspirational diversity of the organization. Since identities can be visible and invisible, outreach calling for participants should explicitly invite people of different races, ethnicities, gender identities, (dis)abilities, ages, sexual orientations, religions, etc. Additionally, various career levels and job functions should be represented.

Once a team is established, create an initial governance and structure for the group, and select a lead (or co-leads). Establish other roles or subgroups as the work gets underway and priorities emerge.

GROW

Even if a firm has not completed a formal assessment of its DEI practices, it may have already identified goals for making progress. If a firm has established a change management team (or DEI council) but has made little or no progress, it may need to evaluate the efficacy of the group.

A few considerations:

- What are the wins to date attributed to?
- What are the challenges to achieving goals or organizational change?
- Are some teams or council members more engaged and active than others?
- Is the team or council comprised of the right individuals (e.g., departments, career levels, identities and decision-making power) based on established goals?

Depending on the answers, it may be time to refresh the change management team or council members. Ask team members how much they would like to recommit for the next period. Be clear about what commitment and responsibilities will mean moving forward. Determine who should be approached for any key openings. Consider whether the team needs a new lead (or co-lead). ***(See Tool #7: Establishing a DEI Council.)***

There may also be factors beyond the group makeup or levels of engagement that have limited their efficacy (e.g., lack of leadership support, limited budget, organizational structure, operational inefficiencies, etc.). If the group identifies barriers that exist outside of its control, it provides direct feedback about its challenges to senior leaders. It is important for the group to be as honest as they feel safe to be to influence the support they receive or manage the expectations of what can be achieved under the current circumstances.

LEAD

If a firm has a change management team in place and is on track to achieve a number of its stated goals, it can consider how to challenge and push progress further.

- Is it time to rotate any team members to call in new voices or perspectives? A good time to consider team changes is at the end of an annual reporting period. However, rotating team members too often (unless there is a specific problem or valid reason) may impede the change process.
- Are there any new decision makers or partners who are important to have represented on the team?
- Is it time to invite external partners to join the change management team in some capacity for their input and increased accountability? External partners include consumers, residents, suppliers/vendors and trade/industry organizations. A consultant may add an objective perspective.
- Geographically dispersed organizations could branch out and create change teams at local sites or the regional level or create pathways that connect their input to the established group.

Other Considerations

From time to time, evaluate the size of the change management team based on how effective it is and the business's needs. If the size has worked well, and all the members are successfully contributing and fulfilling their respective roles, no changes may be needed. However, consider a change if active involvement is limited or the number of members creates unnecessary complexity. The complexity of the organization may be more of a factor in this determination than its size. It's also important to acknowledge that this work can be taxing, particularly for team members from underrepresented identities, and some may need to rotate out or take a break.

CONDUCT AN ASSESSMENT

Philosophy & Commitment → Assemble Change Team → **Conduct an Assessment** → Design Solutions → Measure & Adjust

Overview

After building a change management team and assessing the organization's readiness, apartment firms should review existing policies, processes, practices and norms to understand their impact on the organization, including consideration of the impact on specific demographic groups. Ideally, the outcomes are consistent. For example, when it comes to talent management, an organization's practices should yield similar promotion rates for people across various races, genders, ages, sexual orientations and other identity groups.

The assessment process helps clarify any gaps between an apartment firm's goals and outcomes, and provides information to consider adjustments.

Given the scope and nature of a DEI assessment, firms may choose to engage outside expertise to support executing part or all of it. External expertise may be helpful if:

- The organization can take on some activities but needs support to interpret findings and consider opportunities for adjustment.
- The organization is unsure if it will receive the most candid workforce feedback compared to a third party.
- The change management team lacks the bandwidth or expertise to capture data, analyze inputs, draw insights and make conclusions.

If a firm opts to bring in external support, the consultant should have deep expertise in DEI, including determining priorities based on the assessment findings. A consultant may also advise on or create interventions and solutions for the opportunities identified through the assessment process. ***(See Tool #1: Hiring a DEI Consultant.)***

ESTABLISH

If the firm is in the early stages of its DEI effort, it will benefit from assessing existing priorities and practices to provide a starting benchmark related to the following:

- The firm's demographic makeup across departments and career levels.
- The impact of policies and practices across identity groups.
- The proximity of the firm's workforce experiences with stated values around DEI.
- The effectiveness and transparency of the firm's communications.
- The firm's supplier diversity efforts.

These findings will help decide the most pressing areas to address, "low-hanging fruit" (relatively quick and simple changes that may have an immediate impact) and possible long-term priorities.

GROW

If the firm has completed past assessments but has not surveyed the organization to determine the impact of existing DEI efforts in the past 24 months, it may benefit from a current assessment. A new assessment will clarify the efficacy of policies, day-to-day practices and existing DEI programs. It may identify successful efforts to champion further, or others that may be insufficient or have missed the mark and need an adjusted approach.

Firms in the "Establish" or "Grow" phases can find a detailed explanation of the assessment process, including supplemental resources for assessing supplier diversity efforts, in ***Tool #5: Organization DEI Assessment Guide.***

LEAD

If the firm has assessed the impact of its policies, practices and culture across various identity groups and key leaders/partners within the last 24 months and found the priorities and interventions are clear, they can use those results to continue to the "Design Solutions" phase.

DESIGN SOLUTIONS: DEVISE A STRATEGY TO BRIDGE THE GAP BETWEEN THE CURRENT AND GOAL STATES

Philosophy & Commitment → Assemble Change Team → Conduct an Assessment → **Design Solutions** → Measure & Adjust

Overview

Once a firm has completed an assessment and reviewed the results with relevant team members, the next steps may be to:

1. Communicate the assessment results with the organization to increase transparency and buy-in. Share plans to build on organizational strengths and address any identified gaps, opportunities and challenges. Use the key findings to make a case for new or modified interventions.
2. Establish a transparent internal communication strategy and document the organization's DEI statement and commitments.
3. Convene the change management team to prioritize needs. Consider a priority matrix ***(See Figure 1)*** to guide the strategy's urgency, order and timeline.
4. Establish a project plan, informed by the priority matrix, for embedding DEI throughout the employee life cycle and business practices across functional areas of the business. Ensure strategies are specific, measurable, actionable, realistic and time-bound (SMART) ***(See Figure 2).***
5. Establish measurement and evaluation procedures to encourage progress by holding the organization accountable.

Figure 1
SAMPLE PRIORITY MATRIX

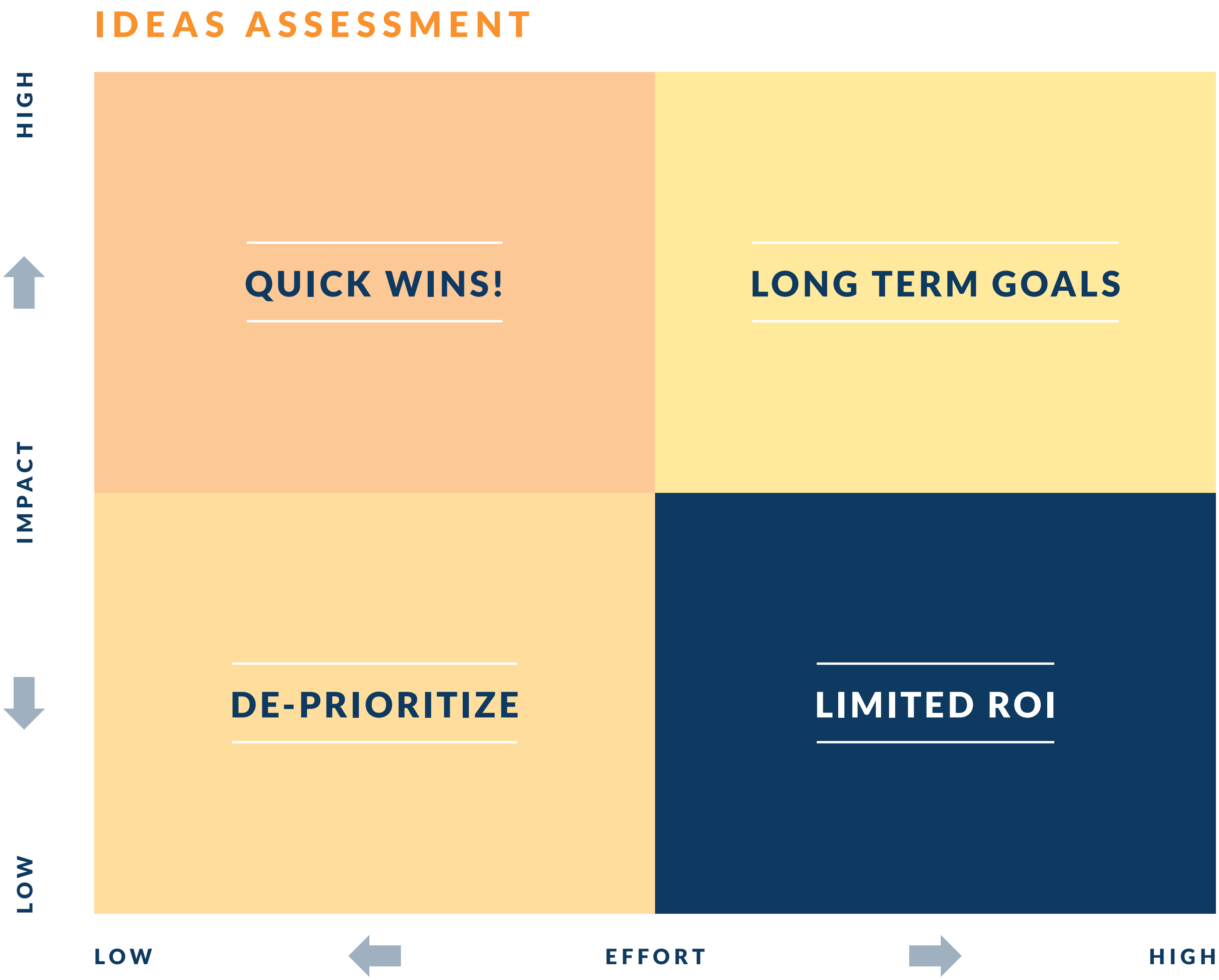


Figure 2
SAMPLE SMART DEI GOAL

Specific:	Improve applicant rates of women, Black and Latinx/e candidates at the mid and senior levels.
Measurable:	Our current application benchmark is 30% women, 5% Black and 7% Latinx/e. We expect a 15% increase in all categories at the end of our new recruiting campaign.
Achievable:	A 15% increase is realistic, especially with sufficient time allocated for the campaign and regular outreach to partner organizations.
Relevant:	Achieving these applicant rates will support our goal of improving underrepresented groups' hiring outcomes.
Time-bound:	The campaign will launch in Q3 and run for 12 weeks. Candidates have until the end of Q4 to complete the online application.

An organization should embed DEI across all operations and functional areas as part of an intentional strategy. Even positive ad hoc efforts yield limited progress toward achieving goals. For example, implementing mandatory inclusive interviewer skills training without broadening the candidate sourcing pools or standardizing interview questions will not likely significantly change hiring outcomes.

The best way to ensure a holistic approach is to revisit the assessment occasionally to identify and align strategies within the areas of opportunity. Effective solutions will likely include a combination of training and knowledge building with modifications to policies and practices. Finally, an action plan should outline priorities and short- and long-term goals.

As with all journeys, the path forward may involve unexpected turns and challenges rather than occurring in a linear manner. Multifamily executives and DEI program leaders are learning in real time to create new business strategies, including talent management approaches, in a post-pandemic work environment. Regardless of how leaders tackle future challenges, efforts to create a diverse, equitable and inclusive work culture can be effective by embedding a comprehensive commitment and adopting strategies and tools for their organization's journey.

SECTION 4

DESIGN SOLUTIONS

DEI ENGAGEMENT STRATEGIES

An effective DEI approach is a competitive advantage. A DEI journey with a deliberate, dynamic strategy that accounts for organizational needs and challenges involves many functional areas and individuals. To build DEI engagement strategies, consider the following questions:

1. What is our baseline? Specifically, are we "Establishing" the process, "Growing" our existing efforts or looking to "Lead" and differentiate with the process? ***See Table C.***
2. What are we looking to achieve? Revisit the parts of the assessment process that highlight gaps in overall DEI engagement and convert those gaps into specific goals.
3. What policy or practice changes do we need to meet our DEI engagement goals?
4. What do we need to ensure the sustainability of our initiatives?
5. What considerations for change management are needed?
   - Who is affected and needs to be involved?
   - What are their needs in this process, and how are they impacted?
   - What knowledge building and training are needed during and coming out of the process?
   - How will we need to communicate with our employers and partners?
   - Who needs to approve of any changes to our approach?

TABLE C

	ESTABLISH	GROW	LEAD
CHARACTERISTICS OF STAGE	There are few, if any, DEI efforts. The organization does not discuss or collectively learn about different identities, cultures, histories or the impact of inequity and exclusion. There are few, if any, safe spaces for underrepresented staff. Little to no budget exists to support DEI.	A DEI lead or DEI council has been established to explore opportunities to build DEI and in the workplace. The organization may have established ERGs, and it offers some opportunities to engage in DEI learning and discussion. Funding for such activities may be considered optional and discretionary.	A DEI leader who is an executive team member is in place. DEI efforts, councils and ERGs have appropriate resources and budgets. The firm tracks its DEI activities to sustain or build on successes and adjusts where necessary.
RECOMMENDATIONS	Check for barriers to psychological safety. Gauge interest in creating a DEI council or ERG.	Establish SMART goals for DEI council/ERGs. Develop a process for measuring effectiveness.	Seek opportunities to differentiate the firm based on DEI engagement efforts; consider ERG compensation.
TOOLS & RESOURCES	6. Building psychologically safe teams 7. Establishing a DEI council 8. Establishing an Employee Resource Group (ERG)	9. Best practices for evaluating the efficacy of councils and ERGs	10. Best practices for compensating council and ERG members

LEARNING & DEVELOPMENT

Learning, development and training should be viewed at the individual and organizational levels through a DEI lens. Start by examining the process currently used to identify learning, development and training needs.

Consider these questions to start an inclusive learning, development and training (re)design:

1. What is our baseline (are we "Establishing" the process, "Growing" our existing initiatives or looking to "Lead" and differentiate with the process)? ***See Table D.***
2. What are we ultimately looking to achieve in creating an equitable and inclusive learning, development and training environment? If necessary, revisit the parts of the assessment process that highlight gaps in these areas and convert those gaps into specific goals.
3. What other considerations are there regarding DEI?
    - Is our learning audience represented in the decision-making process?
    - Who decides what types of development matter and why?
    - Are all voices/needs/ideas taken into consideration? Are varied and accessible modes of learning, development and training offered?
    - Are the learning, development and training professionals on our team well versed in what DEI is and how it applies to the whole organization?
    - Who needs to approve any process changes?
4. What changes do we need to make to our current standard operating procedures or learning management system to track and measure our DEI-related learning and development goals?
5. What changes do we need to make to our learning and development philosophy, standard operating procedures (for knowledge management, career pathing, leadership development, other programs, monetary assistance, etc.) and organizational-level policies to ensure success and sustainability?

TABLE D

	ESTABLISH	GROW	LEAD
CHARACTERISTICS OF STAGE	There are limited or no offerings for equitable learning and development. Job competencies and career roadmaps have not been created. There is no succession planning process in place.	There are some offerings for learning and development. Job competencies and career roadmaps may be in place but are inconsistently applied. The succession planning process may be in place, but it does not intentionally include a review of underrepresented talent.	The organization offers numerous and varied opportunities for learning and growth and monitors their use across demographics to ensure equity. Job competencies and career roadmaps are in place and applied evenly and consistently. The succession planning process is intentionally inclusive.
RECOMMENDATIONS	Determine workforce DEI learning needs. Develop a blended learning offering and ensure knowledge, skill/competency gaps and future business needs inform strategy. Involve a diverse group of employees in the planning and design of learning (DEI committee).	Assess leadership competency. Create a leadership development plan.	Consider taking succession planning process one career level down to identify needs and development strategies for up-and-coming underrepresented talent.
TOOLS & RESOURCES	11. Useful definitions and language 12. Thought leaders to follow 13. DEI learning needs assessment 14. Build your learning and development strategy	15. Inclusive leader quiz 16. Best practices for developing inclusive leaders	17. Inclusive succession planning

PERFORMANCE MANAGEMENT

A firm's performance management approach communicates what it values and expects as an organization. This process can energize team members or cause them to feel devalued and disengaged.

To start an inclusive performance management (re)design, consider the following questions:

1. What is our baseline (are we "Establishing" the process, "Growing" our existing practices or looking to "Lead" and differentiate with the process)? ***See Table E.***
2. What are we looking to achieve? If necessary, revisit the parts of the assessment process that highlight gaps in the process and convert those gaps into specific goals.
3. What changes do we need to make to our systems to track and measure equity in the performance management process (e.g., new or updated human resources information system, ability to track performance outcomes by demographic group, etc.)?
4. What changes do we need to make to our performance management philosophy, standard operating procedures (performance cycle, contributors, evaluation criteria, templates and feedback process) and organizational-level policies to ensure success and sustainability?
5. What considerations for change management are needed?
    1. Who is affected and needs to be involved?
    2. What are their needs in this process, and how are they impacted?
    3. What knowledge building and training are needed during and coming out of the process?
    4. How will we communiczate with leaders and other employees?
    5. Who needs to approve any changes to our approach?

TABLE E

	ESTABLISH	GROW	LEAD
CHARACTERISTICS OF STAGE	There are limited or no formal performance processes or guidelines in place. Job competencies have not been created. Limited feedback is provided, or feedback is based on individual perceptions.	There are formal performance processes and guidelines in place. Job competencies are referenced but may not be applied consistently. Performance outcomes are not monitored for impact across demographic groups.	There are formal performance processes and guidelines in place. Job competencies are consistently referenced and applied. Performance outcomes are monitored for impact across demographic groups.
RECOMMENDATIONS	Standardize and document the performance management process. Evaluate performance practices with a DEI lens to reduce bias in the evaluation and feedback processes.	Promote a continuous feedback cycle with multiple feedback sources to limit bias. Train feedback givers on the use of inclusive language in performance reviews.	Use talent analytics to ensure equity across demographic groups and inform go-forward strategies. Align performance outcomes with personalized development opportunities.
TOOLS & RESOURCES	18. Guidelines for reducing bias performance management	19. Develop a continuous feedback process with 360 reviews	20. Organizational-wide talent calibration

EQUITABLE RECRUITING & HIRING

The recruiting and hiring functions are a common starting place for organizations embedding DEI principles in their talent practices. Before embarking on an extensive diversity recruiting effort, firms should first ensure the operating environment is inclusive and equitable for all groups. If it is not, the organization may successfully reach its diversity recruiting and hiring goals, only to experience turnover among the groups they worked hard to attract.

To avoid this pitfall, firms should review any prior engagement results, turnover data and exit interviews. If possible, review the results by demographic group to understand if any groups are disproportionately or negatively impacted. Firms should be able to objectively assess whether their culture is welcoming, equitable and inclusive for all groups by considering whether it acknowledges and celebrates various lived experiences, provides equitable and inclusive compensation and benefits, has psychologically safe teams and more. Firms should then be honest and transparent with candidates about their employer value proposition as well as where they are still growing and what changes they need to make to achieve their DEI goals.

To start an inclusive recruiting (re)design, consider the following questions:

1. What is our baseline (are we "Establishing" the process, "Growing" our existing efforts or looking to "Lead" and differentiate with our process)? ***See Table F.***
2. What are we looking to achieve in creating an equitable and inclusive recruiting and hiring process? Revisit the parts of the assessment process that highlighted gaps in recruiting and hiring and convert those gaps into specific goals.
3. What changes do we need to make to our systems to track and measure our recruiting and hiring goals (e.g., new or upgraded applicant tracking system, demographic data collection, etc.)?
4. What changes do we need to make to our talent philosophy, standard operating procedures (for recruiting, interviewing and selection) and organizational-level policies to ensure success and sustainability?
5. What considerations are there around change management?
   - Who needs to be involved (who does this affect)?
   - What are their needs in this process (how are they impacted)?
   - What are/will be their needs to contribute successfully to the process (e.g., training/upskilling)?
   - Who needs to approve any changes to the process?
   - How/when will we need to communicate with leaders, hiring managers, interviewers and other employees?

TABLE F

	ESTABLISH	GROW	LEAD
CHARACTERISTICS OF STAGE	There is limited sourcing or outreach to underrepresented groups. Selection criteria are not defined, and interviews are not standardized.	Some hiring goals are in place. The organization may have a handful of partners who engage with marginalized communities. Assessments have some structure but are inconsistently applied.	Talent analytics are used to set hiring goals. Multiple sources of diverse talent pools exist, including schools, partner organizations and an intentionally inclusive referral strategy. Selection and assessment criteria are standardized across similar positions, and these criteria are consistently used.
RECOMMENDATIONS	Scope/rescope position descriptions and selection criteria. Develop an equitable sourcing strategy. Standardize interviews.	Expand sourcing/recruiting channels/partners to better enable equitable hiring. Create an internship program to develop underrepresented talent. Establish accountability for the consistent use of standardized processes.	Create a hiring council as added governance. Outline an equitable onboarding process with support strategies for underrepresented employees.
TOOLS & RESOURCES	21. Best practices for creating inclusive hiring criteria 22. Inclusive job descriptions 23. Inclusive sourcing strategy basics 24. Standardized interviews	25. Sourcing partners in real estate	26. Best practices for creating a diverse interview slate

SUPPLIER DIVERSITY

DEI should be a holistic business strategy embedded into the organization's operations, and its outcomes should be evident to internal and external decision makers. Supplier diversity is an important way for consumers and external partners (residents, suppliers and the surrounding community) to experience a firm's DEI commitment.

This section, and its tools should be shared with procurement, finance and other relevant teams and DEI leaders should partner closely with these teams to ensure their efforts align with the organization's overall DEI vision.

Apartment firms rely on numerous supplier partners and service providers to support apartment community ownership, financing, operations and development. To start a supplier diversity (re)design, consider the following questions:

1. What is our baseline (are we "Establishing" the process, "Growing" our existing efforts or looking to "Lead" and differentiate with the process)? ***See Table G.***
2. What are we ultimately looking to achieve? If necessary, revisit the parts of the assessment process that gaps in supplier diversity and convert them into specific goals.
3. What changes do we need to make to our policies or standard operating procedures to meet our supplier diversity goals?
4. What do we need to do to ensure our initiative's success and sustainability?
5. What considerations are there around change management?
   - Who needs to be involved (who does this affect)?
   - What are their needs in this process (how are they impacted)?
   - What are/will be their needs (e.g., training/upskilling) coming out of the process?
   - How/when will we need to communicate with each of these partners?
   - Who needs to approve any changes to our approach?

TABLE G

	ESTABLISH	GROW	LEAD
CHARACTERISTICS OF STAGE	Existing supplier diversity initiatives, if they exist, are informal or ad hoc. Supplier decisions are decentralized and focus mainly on property-level suppliers.	A supplier diversity program framework is in place, but its execution may be inconsistent or ineffective. Performance data for supplier diversity programs may not exist or may be inconsistently referenced.	A complete supplier diversity program framework (including policy, goals, scope and investment) exists and is consistently executed. The results are closely monitored and reported. The organization has dedicated supplier education/ development initiatives.
RECOMMENDATIONS	Assess your starting place (current state). Develop a program framework. Link with CSR and DEI efforts already in place.	Establish goals and targets. Develop an inclusive sourcing and selection strategy. Outline supplier onboarding process.	Create performance evaluation criteria. Develop supplier outreach and education/development initiatives. Create a plan for ongoing support.
TOOLS & RESOURCES	27. Supplier Diversity Manual, Part 1: Developing a program framework	28. Supplier Diversity Manual, Part 2: Executing the program 28a. Supplier sourcing reference guide 28b. Sample supplier scorecard template	29. Supplier Diversity Manual, Part 3: Evaluating, supporting and maintaining the program 29a. Sample supplier evaluation form

MEASURE & ADJUST: ORGANIZATIONAL ACCOUNTABILITY

Philosophy & Commitment	Assemble Change Team	Conduct an Assessment	Design Solutions	**Measure & Adjust**

A good measurement strategy ensures organizations are investing in meaningful activities that advance progress for underrepresented or marginalized populations.

Measurement and evaluation can take many forms. An increasing number of organizations are measuring DEI as part of a broader framework like ESG (environmental, social and governance). Within an ESG framework, DEI falls under both the social and governance pillars.

Under the social rubric, an apartment firm can measure its effectiveness in hiring, developing and retaining employees. Measurement tools may include, but are not limited to DEI practices, policies and attrition rates. DEI considerations in the governance pillar include gender diversity in senior and middle management and the boardroom.

In some organizations, the DEI council takes on these efforts by working with the organization's functional leaders to measure progress. In others, it may be the HR and talent teams. Regardless of which group holds lead responsibility for the organizational-level scorecard, DEI goals should encompass all functional areas, regional offices and property sites.

Firms should use the Suppler Diversity Baseline Assessment tool ***(Tool #5a)*** to audit their current supplier program and use the metrics examined as their baseline to track outcome progression, stability and regression over time.

- Firms should examine and consider ending ineffective efforts that may have caused prior successes to erode.
- Firms should consider adjusting efforts that neither hurt nor help the results.
- Firms should examine policies and practices that improve outcomes to understand why they worked and where they might elevate and use similar strategies elsewhere.

Once its strategy is underway, organizations should outline their KPIs and revisit them quarterly (at a minimum) to track progress and engagement, report results and adjust strategies as needed.

Leading Indicators are considered precursors to potential trends and can change quickly. They are business drivers and should focus on key impacts.

Example:

Feedback from a diversity event or ERG survey results.

Lagging Indicators are backward-focused. They measure the performance data already captured and provide insight into how things progress.

Examples:

Year-end employee demographics or year-end supplier diversity results.

SECTION 5

DEI TOOLS

TOOL #1: HIRING A DEI CONSULTANT

ESTABLISH GROW LEAD

What are the benefits of hiring a DEI Consultant?

- Hiring a diversity, equity and inclusion (DEI) consultant may allow you to partner with an expert who can support your organizational goals and vision for a more equitable and inclusive workplace and internal culture.
- A consultant can help define short- and long-term goals, create an implementation plan, and establish success benchmarks. Through an objective lens, a consultant can support you in your journey to creating sustainable change, positively impacting your internal stakeholders, improving your relationship with your external stakeholders, and increasing long-term profitability.

When might it be time to hire a DEI consultant?

- Your firm is beginning its DEI journey and is unsure what resources or systems should be in place.
- The organization has received feedback that employees, particularly individuals from underrepresented or marginalized groups, do not feel included.
- There are ongoing instances of harmful bias.
- Talent/HR/DEI leads are at capacity and can use additional resources and guidance.
- Your organization has started several initiatives, but they do not seem to be making a noticeable impact after a sustained period.
- The organization is on track to achieve its DEI goals and existing strategy but wants to ensure that the strategy is sustainable long-term or consider whether the goals need to be expanded.

How do I find a DEI consultant?

- Conduct research to identify a list of 5–8 consultants to assess whether they are the right partner for you. HR and management consulting firms may have DEI strategists, but many boutiques and independent consultants are also in the DEI space. Consider prioritizing businesses owned by underrepresented leaders to continue aligning them with your organization's DEI goals internally and externally. You might also leverage LinkedIn's ProFinder tool, ask for referrals from your network, or perform a simple Google search ("DEI consulting firms") to begin the search.
- Understand prospective consultants' skill sets, qualifications, values and alignments with your firm's values and goals. Look for consultants with deep talent or DEI experience, particularly in implementation. DEI companies or independent consultants should also be able to safely facilitate employee and leadership discussions, leverage and interpret qualitative and quantitative data, and build measurement and accountability practices. There is added value to a consultant who is already familiar with the apartment industry or has successfully completed projects that align with your goals brings added value.
- Additional due diligence can be completed via interviews, testimonials and case studies, indicating deliverables or outcomes achieved and references.

Important considerations:

- What are your organization's priorities and current challenges?
- Consulting engagement budgets can range tremendously and projects can be one-off or ongoing for years. Consider the budget, timeline and your internal team's ability to take on any parts of the work.
- How soon do you want to get these DEI initiatives off the ground?

TOOL #2: ESTABLISH YOUR DEI PHILOSOPHY

ESTABLISH

Assemble a group of key stakeholders to explore your individual and collective values around DEI, starting with your executive officers and board (if applicable). Select an experienced facilitator to moderate the conversation and capture and summarize group sentiments (or engage an experienced external facilitator for guidance and objectivity). As you weigh whether to use an internal or external facilitator, keep these considerations in mind:

Internal Facilitators may:	External Facilitators may:
• Have details about the organization's ongoing priorities • Understand decision-making practices and how the organization operates • Understand decision-makers who are likely to be on board vs. resistant and perhaps how to approach them accordingly	• Facilitate with more objectivity • Offer insights into how other organizations have worked through similar exercises • Have experience engaging and navigating a workforce with a broad range of views and personalities

As a group, explore your collective beliefs around the importance of equity and inclusion. Consider the extent to which you agree with the statements below and why.

In coordination with a facilitator, ask:

- All of our leaders should actively champion and advocate for DEI. What does this mean to you?
- Should we consider DEI in our product and service development, design, and market strategy? If so, how?
- Who will benefit from improved DEI within our organization?
- What does accountability look like? Should there be consequences for those who do not uphold organizational values?
- Are there any aspects of this work that make you hesitant to pursue it? If yes:
    - What are your concerns?
    - What would need to change to commit yourself, the organization, and its resources to this work?

Should you discover areas of misalignment among leaders or those who are not ready to commit? Use insights from these working sessions to consider how you might bring reluctant leaders along.

This might include:

- Providing additional employee or customer data, experiences and insights
- Sharing external research or studies that address specific concerns
- Educating the group on how other leaders with similar businesses and responsibilities overcame their concerns. Share industry and broader DEI practices alongside examples of progress and achievement of desired outcomes to illustrate the potential opportunities that come with engagement and potential risks associated with inaction

To build out the DEI mission statement, have the group define:

- Diversity is important to us because...
- Equity is important to us because...
- Inclusion is important to us because...
- Justice is important to us because...

Review the outputs from your reflection (and note that you may need to step away and continue this discussion over time and with multiple discussions).

- What themes are emerging as most important to the organization?
- In what ways does DEI align with the organization's values?
- What is important for everyone in your organization to know about how its leaders view the criticality of DEI?

TOOL #3: SAMPLE DEI STATEMENT

ESTABLISH

A formal statement is an excellent opportunity to communicate your values and commitments around DEI to your workforce, partners and shareholders. Note that a statement alone is just one step in signaling the organization's intentions and should not replace a comprehensive, people-centered approach to actively changing policies and practices that create safety, access, inclusion and equity for all team members.

When your organization is ready, use the insights from your DEI philosophy ***(Refer to Tool #2)*** and ongoing discussions about your DEI priorities and approach to craft a statement.

Your statement should:

- Reflect and align with organizational values
- Articulate why this work matters to your organization, its people and the community
- State examples of how your organization plans to champion its commitments
- If you have defined them and are open to sharing, state organizational goals as it relates to DEI

A sample statement is provided below. However, each organization should use its specific priorities, internal and external feedback and defined commitments to develop an authentic workplace.

[Organization] believes that our ability to attract, develop and retain talent from all backgrounds and identity groups is vital to our mission and vision. Diversity, equity and inclusion are part of our core values, inspiring an environment that maximizes everyone's contributions, widens the leadership pipeline for all and ultimately improves the quality of our opinions, products and services. More importantly, every individual has a right to a workplace of respect and safety, and each team member's voice and unique lived experiences deserve to be celebrated.

As an apartment firm, we acknowledge the enormous responsibility and opportunity to address historical inequities, particularly within Black and Indigenous communities. Through our commitment to creating inclusive hiring practices, improving our mentorship and development programs, and increasing partnerships with suppliers and organizations supporting progress for underrepresented groups, we can champion justice and equity for historically marginalized communities within and beyond [Organization].

TOOL #4: ASSESS ORGANIZATION'S READINESS FOR CHANGE

ESTABLISH GROW

Organizations can ask these questions to a council, employee focus groups, or an organization-wide survey to assess their readiness for change.

On a scale of 1–5, 1 being not at all and 5 being to a great extent...

1. To what extent do you believe reducing racial and other inequities is mission-critical for your organization?
2. To what extent do you believe that your organization's policies should center on the needs of its people and specifically address the organization's position on DEI?
3. To what extent do you believe your organization's policies, practices, or culture should evolve to improve DEI?
4. To what extent would you support a change in policies, practices, or culture if it helped improve DEI in the organization?
5. To what extent should your organization's senior leadership, including the CEO, explicitly support DEI?

The closer an average score is to 5, the more likely your workforce is to be ready for the change ahead.

Where there seems to be less commitment, the first step may be to explore sentiments of resistance to understand where the organization can address gaps in experience and perspectives. For example, you might follow up low scores with an invitation to share more insights *("To the extent you're willing, please share any additional thoughts/examples/experiences about this topic.")* or hold focus groups with various populations to hear concerns and share the organization's vision.

TOOL #5: ORGANIZATION DEI ASSESSMENT GUIDE

ESTABLISH GROW

1. Determine Your Goal State

To begin your organization's assessment, consider the outcomes it wants to achieve by improving its DEI practices.

Examples of outcomes include:

- Better representation among underrepresented groups, across the organization and at all career levels
- Improved talent attraction and development for a high-performing workforce
- Increased workplace employee engagement
- Improved retention
- Enhanced quality of products and services, as measured by customer or client satisfaction
- Stronger competitive advantage to achieve the organization's mission
- Improved impact within surrounding communities

2. Determine Your Current State

Clarifying your current state involves reviewing key metrics, data, interviews, and anecdotal insights to understand the similarities and differences between the experiences and outcomes of various demographic groups. Demographic groups can include social identities (e.g., race/ethnicity, gender, age, sexual orientation), department or function, career level and tenure (newer team members vs. long-tenured staff).

Three types of data should be collected in the assessment process: survey data, interview data and process or procedure audits.

Surveys

Surveys can be a great way to gain insight into the sentiments and experiences of your workforce and track those sentiments over time.

Survey Best Practices:

- Plan for the survey process to take a minimum of six to eight to complete. The first phase of this process will be spent agreeing on the questions to include.
- Communicate the survey's purpose and key dates with the organization in advance.
- Survey responses should be anonymous. Do not request respondents' names or include trackers in email links.
- Keep the survey open for 2–3 weeks to account for busy schedules, personal time off, or unexpected delays.
- Include at least one open field for additional recommendations and comments that survey questions cannot capture.
- Request demographic information at the end of the survey and explain that the purpose of collecting this information is to understand how different groups experience the workplace and culture, improve DEI in the workplace and ensure follow-up actions address the specific needs raised.
- Considerations when handling demographic data:
  - Carefully consider who will have access to the complete survey data and limit raw demographic data to only a handful of individuals who need it to process and interpret the results. This is particularly critical for smaller organizations or those with fewer than five individuals in any one category. Share who will have access to this level of data in advance.
  - Consider engaging a third party to administer the survey to help limit internal exposure to identifying information.
  - Be sure all demographic questions are optional.
- Communicate confidentiality and the minimum threshold for sharing various attributes of data. *A good rule of thumb is to require a minimum of five respondents in any given category for the results to be visible to leadership or the organization more broadly.*

SAMPLE SURVEY RESOURCES

- Society for Human Resource Management Diversity, Equity & Inclusion Survey
- Employee Diversity Survey Template

Stakeholder Interviews/Focus Groups

While surveys allow for an efficient way to gather many perspectives quickly, focus groups and interviews can help you understand sentiments that are not easily captured in survey form or allow for clarifying conversations and deeper insights.

As you set up interviews and focus groups, include a diverse set of employees (across social identity and workplace demographics) and keep any groups to a maximum of 10 people.

Interview and focus group questions can include:

- How would you describe this organization's values? To what extent do we live up to them?
- In what ways does leadership advocate for DEI?
- To what extent do you feel the organization cares about DEI?
- In what ways do they demonstrate it?
- In what ways does the organization need to change to improve DEI?
- What would you personally like to see changed related to DEI within this organization?

Audits

- Talent analytics (DEI metrics) and talent practices
- Policies & procedures
- Supplier diversity

Talent Analytics (DEI Metrics) and Talent Practices

An organization's DEI metrics should help diagnose risk areas and opportunities and track the progress of new practices against the organization's goals.

Below are examples of metrics that can be measured, tracked and tied to DEI and business outcomes. Examine these datasets with a DEI lens, measuring differences and disproportionate outcomes across demographic groups (social identity, career level, and department). It is common for organizations to find that they have not tracked some of these metrics; thus, they should assess the available data and note areas where they can begin to track outcomes moving forward. For accountability, review these metrics at least quarterly.

AREA	CONSIDERATIONS
POLICIES (E.G., EMPLOYEE HANDBOOK)	• Do policies reflect and reference organizational values? • Do policies exclude any identity groups (e.g., "grooming" or dress codes that ban or discourage culturally significant hairstyles or attire)? • Are there specific statements about anti-racism, sexual harassment and other forms of oppression in the workplace? Are the behaviors that will not be accepted clear? • Are accountability measures for policy violations clear and consistently applied?
TALENT PRACTICES/POLICIES	• Consider the following talent areas. Do all processes and practices yield similar access and outcomes across demographic groups? Are there standardized practices in place to mitigate bias in decision-making and outcomes? • Recruiting/hiring • Compensation/rewards and recognition • Performance • Advancement and promotion • Succession planning
LEARNING AND DEVELOPMENT OPPORTUNITIES	• Do all people within the same function and at the same career level have similar access to development opportunities (e.g., training, coaching, conference participation)? • How are special and stretch projects assigned? Is the selection and participation rates similar across groups?
MENTORING AND SPONSORSHIP PROGRAMS	• Do mentorship and sponsorship programs exist? • Is the selection for them equitable? • How effective are they?

Supplier Diversity

Whether your organization is already doing business with a diverse set of suppliers or is just starting to think about supplier diversity, a baseline assessment is the best way to start. The assessment should explore the following broad areas:

- Organizational philosophy, attitudes and beliefs around diversity, which may already be addressed as part of your broader DEI work
- Organizational commitment level to supplier diversity
- Organizational goals and metrics around supplier diversity
- Organizational communication around supplier diversity
- Supplier programs/education

Use the Supplier Diversity Baseline Assessment Tool (Tool #5a) to benchmark your starting point. This will determine whether you are establishing, growing, or leading in your supplier diversity initiative.

If your organization already has some activity around supplier diversity, a logical next step would be to analyze the current efforts. A procurement spend analysis can provide data that can be used as a baseline to measure improvements.

The spend analysis process involves gathering purchase history data to answer and assess the organization's expenditures.

- Who are our suppliers (e.g., organization profile, designations and reputation)?
- Who is making my organization's buying or supplier/vendor selection decisions? What criteria are being used to make these decisions?
- What services (e.g., groundskeeping, maintenance and other property services) or products (e.g., appliances, software and materials) are we purchasing from our suppliers and how often?
- How much do we pay our suppliers for their products or services? Where (geographically) are those products or services conducted?
- How are we evaluating our suppliers? Are we getting what we were promised?

3. Assessing Your Organization: Reflection Questions

1. In which phase of the DEI continuum (Establish, Grow, Lead). ***(See Table B in Section 2)*** is your organization? The organization may be "establishing" in some areas and "growing" in others. You may even be "leading" in places. Note the areas where you need to start or enhance practices or address new priorities.
2. What are your organization's most pressing DEI challenges?
3. What policies, practices and programs disproportionately disadvantage marginalized groups?
4. Which marginalized groups are most impacted by inequity and exclusion within your organization?
5. Which departments or leaders must be engaged to address the identified gaps and opportunities?
6. Are there any roadblocks or barriers (e.g., lack of leadership buy-in, budget restraints and structural challenges) that might undermine progress?
7. Are there any external pressures to consider?

Use the answers to these reflections to identify your priorities and consider the next steps.

TOOL #5A: BASELINE ASSESSMENT FOR SUPPLIER DIVERSITY PROGRAM

Use results to benchmark and identify focus areas.

Please rate the following statements on a scale of 1 to 5. (1=Strongly Disagree, 5=Strongly Agree) or (1-No, 5=Yes)

ORGANIZATIONAL ATTITUDES & BELIEFS AROUND DIVERSITY

1. Our customer/resident base is fairly diverse, i.e., 30% or more of our customer base/residents are from an underrepresented group?
1○ 2○ 3○ 4○ 5○

2. Workforce engagement survey results are favorable in the area of diversity, equity and inclusion.
1○ 2○ 3○ 4○ 5○

3. We are actively involved with Women and/or Minority-Owned Business trade organizations.
1○ (No) 5○ (Yes)

FORMAL COMMITMENT

4. There is C-Level support for Supplier Diversity in both action and words.
1○ 2○ 3○ 4○ 5○

5. We have a formally written Supplier Diversity policy.
1○ 2○ 3○ 4○ 5○

GOALS & METRICS

6. We have set meaningful and measurable supplier diversity goals for our organization.
1○ 2○ 3○ 4○ 5○

7. We report regularly to our C-level Executives and/or Board of Directors on our Supplier Diversity metrics and progress.
1○ 2○ 3○ 4○ 5○

8. There is personal accountability for all our managers in helping us meet our Supplier Diversity goals.
1○ 2○ 3○ 4○ 5○

9. We have a reporting and review method in place for feedback and improvements regarding our Supplier Diversity program.
1○ 2○ 3○ 4○ 5○

COMMUNICATION

10. Our Supplier Diversity initiatives have been organizationally communicated throughout the company.
1○ 2○ 3○ 4○ 5○

11. Our Supplier Diversity programs and policies are publicly accessible through printed materials or on our website.
1○ 2○ 3○ 4○ 5○

12. We have developed a process for sharing diverse supplier candidate information across departments/divisions.
1○ 2○ 3○ 4○ 5○

SUPPLIER PROGRAMMING & EDUCATION

(Skip if you have not started a supplier diversity initiative.)

13. We have a formal mentorship and/or development program in place for suppliers.
1○ 2○ 3○ 4○ 5○

14. We have an education program in place to share our company's Supplier Diversity policies and goals with our Tier 1 suppliers.
1○ 2○ 3○ 4○ 5○

INTERPRETING YOUR SCORE:

47-70 = Leading

26-46 = Growing

26 or below =Establishing

TOOL #6: BUILD PSYCHOLOGICALLY SAFE TEAMS

ESTABLISH

One of the most important things inclusive leaders do is create safety within their team. Here are some behaviors that emotionally intelligent people leaders exhibit in supporting their people.

Pay attention to your team. Focus on them, not just on their work
Get to know your team members, their motivations and their aspirations. Make time for regular one-on-one meetings and show a genuine interest in your team members' professional development and their personal and workplace experiences. Proactively engage them during times of stress and overwhelm to understand how you and other team members might better support them.

Solicit questions and opinions and create multiple channels for doing so
People engage and communicate in different ways. It is important not to assume that those who do not speak up have little to contribute.

Ask for your team members' perspectives or offer different communication channels (e.g., email or shared documents) so that everyone can fully participate.

Watch how you handle mistakes
How leaders respond to mistakes can be an opportunity for learning, growth, and innovation, or it can discourage people from taking meaningful, calculated risks at work. Avoid harsh repercussions for genuine mistakes; use them instead to unpack what went wrong and what the team can take away for better future decision-making.

While you are at it, own up to *your* mistakes and learnings.

Ask for feedback
Feedback should flow in more than one way. Role model openness and curiosity about other perspectives by soliciting input from your team. Ask team members to challenge your thinking or share where you can develop as their leader. Remain open, thank them for their candor and consider your responses carefully.

Even if you do not action everything you hear, the perspectives shared are a good opportunity to realign on expectations and experiences.

Show appreciation for your team's contributions
Recognize and show appreciation for each team member's contributions. Give credit where it is due and use the opportunity to amplify fresh perspectives and innovative solutions from those most likely to be overlooked. Showing appreciation is a great way to reinforce that all ideas and contributions are welcome and encourage team members to open up.

Consider what motivates each team member and use the appreciation language that resonates best with them.

TOOL #7: ESTABLISHING A DEI COUNCIL

ESTABLISH

The primary role of a DEI Council is to connect DEI activities to the broader organizational strategy. A council typically consists of a group of employees, including senior leaders, who work closely with others across the organization to operationalize DEI initiatives.

DEI Councils provide governance and oversight of DEI efforts, including senior leadership levels' accountability. Support from the C-suite is critical for a council to be effective and reach its goals. The council may also lead communications around DEI and report on progress.

Councils should be composed of individuals across several dimensions of diversity. Members can also include Employee Resource Group (ERG) leads, departmental representation and individuals with DEI expertise who do not work for the organization. External members can provide expertise or offer a customer's or resident's perspective in council discussions.

Depending on how a firm is structured, it may have executive and regional diversity councils representing multiple operational components, business units, locations, etc.

SELECTING COUNCIL MEMBERS

Ensure they:

- Have a personal and professional commitment to advancing DEI
- Know challenges within or across business units
- Know how work gets done across the organization and can engage others as needed
- Reflect a balanced representation of the business (as a group)
- Include members of the leadership

SAMPLE RESPONSIBILITIES

- Identify barriers to access and development across the people functions
- Assist in the creation of DEI strategy and goals
- Operationalize DEI across the organization
- Oversee ERG groups and satellite councils
- Ongoing assessment of goals and results
- Participate in the creation of DEI content and communications

TOOL #8: ESTABLISHING AN EMPLOYEE RESOURCE GROUP

ESTABLISH

What is an Employee Resource Group (ERG)?

An ERG is a group of employees (internal communities) who share similar identities or lived experiences, including, but not limited to, race/ethnicity, gender, age, sexual orientation, disability, veteran status, or caretaker status. Membership is voluntary and typically open to all of the organization's employees.

ERGs help to foster personal connections and relationship-building with others who share a mutual identity, lived experience or interests. They can provide opportunities for professional development, innovation, mentorship and community.

Additionally, ERGs play a major role in advancing an organization's internal and external DEI goals by developing mutually beneficial relationships between its members, the organization's leaders and other invested groups. As a voice for a group of underrepresented employees, an ERG can play an instrumental role in providing critical feedback and insights that executive and HR/talent teams need to advance their DEI work.

Steps for Establishing an ERG

1. Survey the organization for interest and potential areas of focus
2. Prepare a purpose statement and include desired outcomes
3. Work with the people/talent team to create an application process for key positions/roles
4. Create a list of potential champions, sponsors and ERG leads, considering team members across various functions and locations
   - Invite them to meet to explore the new ERG
   - Co-create a group charter using insights from the organization survey, assessment insights and the working group's perspective
   - Develop goals, objectives and tools for measuring success
5. Invite others within the organization to participate via preferred communication channels for your organization (email, website, chat tool, etc.)

TOOL #9: BEST PRACTICES FOR EVALUATING THE EFFICACY OF COUNCILS AND ERGS

GROW

Establish Key Performance Indicators (KPIs) for your Council or ERG by selecting among the common areas of evaluation for Councils and ERG groups below.

Leadership support
- Number of senior leaders who sponsor or are engaged in Councils or ERGs
- Leadership adequately funds Councils or ERGs and provides resources and approvals needed for their success
- Leadership includes Council and ERG priorities on company, department and executive team agendas for amplification and organizational engagement

Professional development
- Number of learning opportunities for all career levels
- Completed development needs assessment for the group

Products and services
- Input on product/service development and testing
- Participation in consumer/resident focus groups
- Advertising campaign input/social media marketing efforts\

Community
- Involvement in community events
- Number of members on the boards of community organizations
- Resident outreach

Specific goals and metrics will vary by organization

Partnerships/collaborations
- Collaboration with external thought leaders in the multifamily/real estate industry
- Collaboration with other internal teams, committees and forums

Culture
- Education/awareness events
- Culture/engagement survey results
- ERG satisfaction

SAMPLE SCORECARD

ASSESSMENT CATEGORY	Exceeding	On Target	Underperforming
Leadership Support			
Professional Development			
Products and Services			
Community			
Partnerships/Collaborations			
Culture			
Other			

TOOL #10: COMPENSATING COUNCIL AND ERG MEMBERS

LEAD

Compensating Council and ERG groups is increasingly becoming a consideration among organizations leading in the DEI space.

ERG members may take on additional responsibilities on top of their full-time work. The value they contribute to the organization is well worth evaluating as part of their compensation.

ERG and Council leads who feel supported and appreciated are more satisfied overall, more willing to go above and beyond in their roles, more optimistic about their career and more satisfied with their career progression.

There is not a one-size-fits-all approach to compensating ERGs and Council members; however, some considerations are:

1. Cash, bonuses, or stock options
2. Budget for external learning (e.g., conferences, group membership fees, coaching and courses) connected to the ERG's success
3. Access to additional internal coaching and mentorship opportunities
4. Organization-wide recognition/awards

Whichever combination of the above your organization chooses to compensate your ERGs and Council members, the terms should be transparent and revisited with the same cadence as other internal compensation reviews.

For additional guidance on compensation and budgets for ERGs and Councils, download Diversity Best Practices' Diversity & Inclusion Councils and Budgets.

TOOL #11: USEFUL DEFINITIONS AND LANGUAGE

While the language around DEI continues to evolve, having a foundational and shared understanding of key terms will promote your communication and strategy-building efforts. The language will change, so this list is not meant to be finite or static—continue your education and incorporate new or updated insights into your education over time.

Note that a Google search of any of these terms will yield numerous definitions; this glossary is presented as one set of descriptions to support your learning.

SOCIAL IDENTITIES	INCLUSION
RACE	JUSTICE
GENDER	BIAS
LGBTQ+	MARGINALIZATION
DISABILITY	SYSTEMIC OPPRESSIONS
INTERSECTIONALITY	ALLYSHIP
DIVERSITY	PSYCHOLOGICAL SAFETY
EQUITY	EMPLOYEE RESOURCE GROUP (ERG)
EQUALITY	DEI COUNCIL

For resources on individual rights, federal policies, legal definitions and employment guidelines, visit the U.S. Department of Labor and the U.S. Equal Employment Opportunity Commission (EEOC).

SOCIAL IDENTITIES

Social identities refer to a person's sense of who they are based on their group affiliations. We naturally categorize people (including ourselves) to understand our social environment. Some identities are fairly stable (e.g., family history or ethnic background). Others, such as parental status, education or class, can change.

Social identities are layered and complex. Each of us holds multiple identities, and our unique combination of them can shape how we experience our environment and how others perceive us. Understanding social identity and its impact and how people relate to each other can help us explore the origin of some of our biases toward or against certain groups and the norms that shape our organizations. Race, gender, LGBTQ+ and disability are defined further in this glossary.

RACE
Race is a socially constructed concept that typically highlights the physical attributes of an individual or group. It most often refers to a person's skin color and facial features. There is no scientific evidence that race has anything to do with DNA.

Throughout modern history, race has been a tool for categorizing, subjugating and oppressing groups of people. While the idea of race was invented, it is embedded in our social environments and sense of identity.

GENDER
Gender is a social construct that we use to characterize people based on norms, behaviors and roles that society deems to be whether or to what extent someone is either masculine or feminine. We typically label people as men or women. However, because gender is an assumed binary social construct, it does not consider gender-fluid and gender-nonconforming identities.

Gender can be a way to discriminate against people who do not adhere to the status quo. When gender and intersectionality are considered, we can identify where inequalities, inequities and systemic issues may exist.

Learn more about this from the World Health Organization , along with resources from genderbread.org.

LGBTQ+
An LGBTQ+ person identifies as lesbian, gay, bisexual, transgender or queer. Sometimes, when Q is added to the end of LGBT, it can also mean questioning.

Understand different terms related to the LGBTQ+ community with this resource from GLAAD.

DISABILITY
According to the Centers for Disease Control, a disability is any condition of the body or mind that makes it more difficult for a person to perform certain activities and interact with the world around them. Individuals can have disabilities that are physical or cognitive, apparent or nonapparent.

Examples of disabilities include any impairment that may make it challenging to perform physical activities (e.g., walking and climbing stairs) impaired senses (e.g., blindness and deafness), or cognitive challenges (e.g., difficulty communicating challenges with memory). Disability can also include mental health conditions that have a long-term impact on a person's day-to-day activities.

Learn more about disabilities and health from the Centers for Disease Control and Prevention. For resources on individual rights, disability law and employment guidelines, visit the Americans with Disabilities Act, the U.S. Department of Labor and the U.S. EEOC).

INTERSECTIONALITY
Distinguished professor, Kimberlé Crenshaw, coined the term "intersectionality" to describe how Black women's social identities overlap, resulting in an experience of both racial and gender marginalization. Intersectionality has evolved to include all people with multiple marginalized social identities, as a compounding experience of oppression can occur.

As you evaluate workplace policies and practices and design interventions and solutions, intersectionality must be considered. For example, creating a program that solely addresses gaps in access a person of color may experience but does not account for the lack of opportunity or exclusion a woman might encounter is likely insufficient in creating equity for a woman of color.

DIVERSITY
As it relates to people, diversity refers to the presence of different social identities and cultures within a group. Ideally, as institutions seek to achieve diversity, the goal is ultimately the equitable and inclusive representation of various identities, perspectives and differences.

> The Diversity Wheel, developed by Marilyn Loden and Judy Rosener, is one framework for exploring the different dimensions of diversity.

Individuals should not be referred to as "diverse." Instead, groups can be described as such to the extent that different lived experiences and social identities are represented within the group.

EQUITY
Equitable treatment centers on fairness and justice. A useful way to consider equity is to contrast it with the commonly conflated use of the word equality. Equality is giving everyone the same resources. Equity is giving people access to the resources they need. Equity accounts for some groups' historical and present-day systemic oppression and disadvantages.

Within institutions, equity refers to the policies, practices and structures that level the playing field for everyone, taking into consideration historical exclusion, inequalities and barriers that burden some groups. Specifically, in the workplace, equity-building can be applied to hiring, feedback, development practices, promotion practices, advancement and compensation—to name a few. Creating equity may involve intentional outreach to underrepresented communities that have historically been left out of hiring efforts due to the advantages given to employee networks and referrals. It may also include a systematic and regular review of compensation to ensure that all employees producing the same work are compensated within a reasonable pay range of each other. The assessment and tools in this toolkit are designed to help organizations consider how they build equity alongside diversity and inclusion.

A CASE FOR BUILDING EQUITY

Fully 42% of private colleges and universities in the United States still consider "legacy" as part of their admissions decisions, including 75% of the top research institutions and liberal arts colleges. Legacy applicants are those with familial ties to a college or university alum.

Consider the impact of legacy admissions on a first-generation college student (or any student whose parent or grandparent was systemically denied access to their college of choice). Their grade point average or test scores may need to be stronger than those of a legacy applicant. Perhaps they need more significant leadership or extracurricular activities to stand out. Maybe their personal story needs to be that much more compelling. All things being equal, the edge given to legacy candidates disadvantages nonlegacy candidates in the admissions process.

The fact that some people have advantages in the admissions process does not mean they are not hard-working or deserving of their spots. It does highlight a benefit they receive that non-legacy students do not, one that can have a meaningful impact on their education and future career opportunities.

Consider who might be excluded from employment opportunities with organizations that recruit exclusively (or mostly) from schools accepting legacy applicants.

Sources:
The Benefit of Legacy Status
Elite colleges still giving wealthy and connected students a 'legacy admissions' edge during the pandemic

Focusing on equity allows us to rebalance and redistribute access and resources where they have not historically existed.

EQUALITY

Equality refers to the belief that everyone deserves the same rights, access and opportunities.

While it is a great value to hold, equality does not account for the circumstances that may result in *inequality*. That is why, in this work, we center on equity. Equity accounts for inequalities imposed upon groups due to socioeconomic status, citizenship, racial, ethnic and gender identity, education and more.

INCLUSION

Inclusion ensures everyone has an equal opportunity to be validated within a group. In inclusive environments, everyone has an opportunity to be involved in decisions that impact them and their organizations, institutions and communities. Their perspectives are valued, their voices are heard and amplified, and credit is given where due.

For organizations to be truly inclusive, they need to champion and uphold a culture of belonging and psychological safety where all people feel valued and can bring their authentic selves to work. As organizations consider inclusion, it is essential to understand the nuances between marginalization and underrepresentation.

Marginalization refers to groups that have been systemically excluded from rights and privileges afforded to others in society due to aspects or characteristics of their social identities. Additional insights into marginalization can be found here.

Underrepresentation refers to the disproportionately low representation of persons or groups within a larger group.

While both marginalized and underrepresented people can experience exclusion, we should distinguish *marginalization* from *underrepresentation* when we think about inclusion at work. A person can be both marginalized and underrepresented, but these two categorizations do not always overlap. For example, a man in a team of primarily women may be *underrepresented* on that team but not marginalized (at least not from a gender identity or systemic power perspective).

JUSTICE

In the context of DEI, justice is about dismantling inequitable systems and structures and replacing them with those that promote fairness. Justice refers to creating opportunities for people who are historically marginalized to thrive.

BIAS

Bias refers to stereotypes, assumptions and associations that we may hold about individuals or groups of people, and they often reflect our attitudes toward or against individuals and groups.

We all carry biases, whether or not we are aware.

Biases are part of how our brains naturally function to help us quickly categorize information and the world around us. While the mechanism of bias itself is not inherently good or bad, the circumstances that shape it are contextual, learned and not always based on facts. Therefore, decisions we make based on our biases can be incorrect and most often negatively impact marginalized groups and are burdened with harmful societal narratives.

Bias can be found throughout the workplace—from hiring to relationship development and promotions to business partnerships. Consider the lens through which key decisions are made and structure and standardize practices to mitigate individual and organizational biases.

EXPLORING BIAS

A young Black couple with two small children wants to apply for a three-bedroom unit in an apartment building in an expensive metro area. The rental office manager assumes the couple would have to stretch to make the payments for the apartment and finds herself annoyed with the time she would likely waste showing them the unit.

MARGINALIZATION

Marginalization refers to the experience of groups that have been systemically excluded from rights and privileges afforded to others in society, including limited access to opportunities and resources.

Marginalization can be found across numerous aspects of identity, including race, ethnicity, gender, sexual orientation, (dis)ability, socioeconomic status, mental health, and more. An organization valuing equity and justice will seek to eliminate gaps in workplace experiences and outcomes for marginalized groups.

SYSTEMIC OPPRESSIONS

Systemic refers to the historical and ongoing organized patterns of behavior, policies, practices and treatment woven into how institutions, governments and organizations operate. Systemic oppressions perpetuate discrimination and uphold disadvantages for marginalized groups. Examples include racism, sexism, heterosexism, ableism and classism, among others.

Like bias, systemic oppressions can be found in many organizations, often without realization or acknowledgment. Assessing the workplace for differences in experiences and outcomes across groups and then structuring and standardizing practices is one step toward addressing systemic oppressions.

ALLYSHIP

Allyship refers to using one's influence, power and privilege to work toward building a fairer, more inclusive and just world for those with marginalized identities.

Allyship requires action. It is a lifelong process and commitment to educating yourself about your histories and areas of privilege, understanding the needs of (other) marginalized groups and related social justice movements through listening and partnership and determining the actions that can be taken to support building equity for all.

Authentic allyship is not only committing to self-reflection and personal education; it is using your influence and resources to amplify the needs and contributions of marginalized communities. It is also sharing your power and resources where they can create equity for other groups. In the workplace, this may look like speaking up on behalf of a colleague who experiences a microaggression or amplifying their contributions, sharing your pronouns, or asking for accessibility accommodations, whether or not you need them.

PSYCHOLOGICAL SAFETY

In the workplace, psychological safety refers to the shared belief and practice that allows each team member to be comfortable being themselves and raising ideas, concerns or questions without fear of negative repercussions, such as retaliation or rejection.

Psychological safety is a necessity for inclusion and high performance. When team members feel safe, they can contribute fully, innovate and challenge the status quo—all factors needed to build sustainable and transformative organizations.

DEI COUNCIL

The primary role of a DEI Council is to connect DEI activities to the broader organizational strategy. The council typically consists of a group of employees, including senior leaders, who work closely with others across the organization to operationalize DEI initiatives.

The DEI Council provides governance and oversight of DEI efforts, including accountability for senior leadership levels. Support from the C-suite is critical for the council to be effective and reach its goals. The DEI council may also lead communications around DEI and report on progress.

Councils should be composed of individuals across several dimensions of diversity. Members can also include ERG leads, departmental representation and individuals with DEI expertise who do not work for the organization. External members can provide expertise or offer a customer's or resident's perspective in council discussions.

Depending on how an organization is structured, there may be executive and regional diversity councils that represent multiple operational components, business units, locations, etc.

EMPLOYEE RESOURCE GROUP (ERG)

An ERG is a group of employees (internal communities) who share similar identities or lived experiences, including, but not limited to, race/ethnicity, gender, age, sexual orientation, disability, veteran status, or caretaker status. Membership is voluntary and typically open to all the organization's employees.

ERGs help to foster personal connections and relationship-building with others who share a mutual identity, lived experience or interests.

The primary role of a DEI Council is to connect DEI activities to the broader organizational strategy. The council typically consists of a group of employees, including senior leaders, who work closely with others across the organization to operationalize DEI initiatives.

TOOL #12: FOLLOW THOUGHT LEADERS

You can follow many organizations and DEI leaders to continue your learning journey. Below is a list of recommendations for DEI strategists and leaders across various identity groups and disciplines. (Please note that this is not an exhaustive list. You should also follow leaders in alignment with your personal and organizational values.)

PERSON, ORGANIZATION OR ACCOUNT	DEI TOPICS OR COMMUNITY
National Multifamily Housing Council www.nmhc.org/DEI	Landing page, various NMHC DEI resources, including Racial Equity Event, toolkits, committee, etc.
The Cee Suite, LLC (@theceesuite_ig on Instagram @theceesuite on Twitter LinkedIn page)	DEI consulting, DEI in the workplace, anti-racism, bias, belonging, marginalized communities, allyship and solidarity, workshops/training, education, inclusive leadership
Lily Zheng (LinkedIn page)	DEI in the workplace, trans inclusion and identity, disability justice, LGBTQ+ community, allyship and solidarity
Michelle Kim (@michellekimkim on Instagram)	Anti-racism, DEI, justice and anti-Asian racism, allyship, DEI in the workplace
Amanda Nguyên (@amandangocnguyen on Instagram)	Anti-racism, general DEI, justice and anti-Asian racism, allyship
Richard Orbe-Austin, PhD (@drrichorbeaustin on Instagram)	DEI in the workplace, psychology
Diversability (@diversability on Instagram)	Disability community, privilege, and allyship from able-bodied folks to folks with disabilities)
The Winters Group https://linkin.bio/thewintersgroup	DEI in the workplace, DEI, leadership
Dr. Ibram X. Kendi (@DrIbram on Twitter)	Anti-racism

PERSON, ORGANIZATION OR ACCOUNT	DEI TOPICS OR COMMUNITY
Chezie HQ (@cheziehq on Instagram)	Diversity in the workplace human resources
Sharon Nyangweso (LinkedIn page)	Diversity in communication, trauma, anti-racism, DEI in the workplace
Farzin Farzad (LinkedIn Page)	Decolonizing the workplace
Antiracist Research & Policy Center at AU www.american.edu/centers/antiracism/	Anti-racism and general DEI
Bloomberg Equality (@bloombergequality on Instagram)	DEI in companies and institutions—gender, race and class
Human Rights Campaign www.hrc.org/resources/glossary-of-terms	LGBTQ workplace inclusion
Dr. Eric Cervini (@ericcervini on Instagram)	LGBTQ Historian, diversity in communication
Jermaine Fowler (@thehumanityarchive on Instagram)	Historian, anti-racism educator
Lettie Gore (@sincerely.lettie on Instagram)	Historian, anti-racism educator
NDN Collective https://ndncollective.org/	Indigenous community

TOOL #13: DEI LEARNING NEEDS ASSESSMENT

ESTABLISH

Before creating a DEI learning program, survey your workforce to get an idea of where the most need and interest is across the organization.

This assessment can be used as a data point to evaluate overall readiness. However, the main focus is on the organization's learning needs. **On a scale of 0 to 5 (5 being the highest), How comfortable do you feel in your knowledge of the following DEI-related topics?**

- Understanding the meaning of DEI and their application in the workplace
- Implicit and explicit bias
- Inclusive workplace practices
- Inclusive leadership
- Cultural competence
- Psychological safety
- Microaggressions
- Power and privilege
- Allyship
- Anti-racism
- Intersectionality

1. What would you describe as the most pervasive DEI-related issue facing our organization?

2. What DEI-related workplace issue do you feel least prepared/able to address?

3. What DEI-related workplace issue do you feel most prepared/able to address?

4. What areas do you most hope to develop?
    - Development in my personal DEI journey
    - Leading inclusively
    - Increasing confidence/comfort level in addressing DEI workplace issues and having DEI-related conversations
    - Other (please specify)

5. How would you prefer to learn about DEI-related topics?
    - Face-to-face workshop
    - Online workshop (live)
    - On-demand (videos)
    - Reading material/toolkits

6. Is there anything else you would like to share?

TIP

Add some or all demographic questions for insight into how learning needs/interests vary by groups (e.g., race/ethnicity, age, gender, sexual orientation and disability). Depending how your organization is structured, you may want to collect information on location, department, function or career level.

TOOL #14: BUILD YOUR LEARNING AND DEVELOPMENT STRATEGY

ESTABLISH

Many organizations have recognized the need to build individual and collective competency around DEI. For some multifamily organizations, this was an unexpected pivot. However, by integrating a DEI learning strategy alongside key policy and practice changes, organizations can enable employees to become more culturally competent, empathetic and self-aware.

The learning and development strategy inputs are directly correlated with the return on investment of your organization's learning function. For this reason, the business's employee development practices and DEI learning strategy must be purposefully aligned. Additionally, understanding the various channels for on-the-job learning within the company—whether in the corporate office or at the property—is necessary to correctly map your learning and development opportunities.

As your organization develops its DEI learning strategy, it should consider the following:

- The current learning and development philosophy and budget allocations
- Key inputs for developing education and training content (e.g., performance gaps, new workforce skills/competencies development and results of learning needs survey)
- The process and systems for knowledge/learning management
- Administrative and staffing needs (from property level up through corporate administrative, professional and technical services)
- The accessibility needs of the workforce (i.e., ensuring content is available to and usable by those with disabilities, such as vision, hearing, mobility or cognition impairments)
- The ever-changing needs of learners and external influences

Three core areas should inform the organizational learning roadmap to ensure alignment:

1. The skills, knowledge and abilities required to meet current and future business and industry needs—some organizations may have translated this into competency models, which are collections of competencies (knowledge, skills and & abilities) that are needed for effective job performance
2. Organizational and leadership capability as well as areas of opportunity (as mostly determined through your performance management process)
3. Organizational core values

Organizations should conduct periodic learning needs assessments to address the workforce's ever-changing needs. The recent demand for DEI-related learning can be strategically executed by developing a benchmark for the organization's current competency level.

TOOL #15: INCLUSIVE LEADER QUIZ

GROW

Organizations committed to making DEI an organization-wide core competency should start by assessing its leaders and people managers. This short quiz can be a good starting place for identifying the necessary learning path for inclusive leadership. Share this with your managers as a quick assessment of equitable people management behaviors. The more an individual responds "often," the more they exhibit t behaviors needed to lead their teams inclusively.

How inclusive are you in the workplace?

Read the statements below and select one of the following: often, sometimes, or rarely.

Often, Sometimes, Rarely

I take the time to plan how I can support the growth and development of my team based on each person's knowledge, skills and interests ____________________

I ensure everyone on my team has the same access to development opportunities, feedback and insights about our team goals ____________________

I use structured criteria and assessments whenever I interview, hire or promote team members ____________________

I proactively invite viewpoints from a diverse set of identities and perspectives ____________________

Mistakes are seen as an opportunity to learn and adjust how we work or what we do rather than an opportunity to blame or discredit others ____________________

I consider how my own identities and experiences may influence my perspectives, actions and decisions about other identities and experiences in the workplace ____________________

Transfer your *sometimes* and *rarely* responses into your learning roadmap.

TOOL #16: DEVELOPING INCLUSIVE LEADERS

GROW

Inclusive leadership is essential to creating an environment where employees can thrive. The professional services firm Deloitte has identified six signature traits of inclusive leaders, along with some suggestions for organizations to support and develop inclusive leadership capabilities:

The six signature traits include:

1) Commitment
2) Courage
3) Curiosity
4) Collaboration
5) Cultural intelligence
6) Cognizance of bias

TIP

If you have a learning management system with content, search by competency to see what you may already have in-house.

Developing Inclusive Leader Capabilities

- Highlight inclusive leadership as a core competency in your organization's strategy
- Ensure inclusive leadership competencies are integrated into your talent practices:
  - Recruiting and hiring (include these traits in job postings and evaluate them during behavioral interviews)
  - Performance management (link to KPIs, formally assess inclusive leadership capabilities ***[Refer to Tool #15]*** across all leadership levels and hold leaders accountable to inclusive behaviors and DEI outcomes)
  - Rewards and recognition (showcase and reward highly inclusive leaders and, highlight examples of inclusive behavior)
  - Leadership development (integrate inclusive leader traits into leadership development programs and encourage leaders to seek feedback from others on how well they model inclusive leadership)
- Invest in a variety of learning resources that address inclusive leadership competency gaps (e.g., emotional intelligence and leadership workshops, one-on-one coaching, internal discussion groups and self-directed learning including articles, books and online courses)

TOOL #17: INCLUSIVE SUCCESSION PLANNING

LEAD

Succession planning aims to identify the next generation of leaders to ensure business continuity and sustainability. Diverse teams are built through intentional and strategic succession planning that identifies and develops top talent to replace key contributors. The focus should be less on backfilling key positions and more on developing a strategy to deliver a robust, diverse talent pipeline. The process itself involves identifying key positions, their potential timeline for vacancy and possible future candidates to fill them.

1. Start the succession planning process by identifying key leadership roles and critical positions.

2. For each role, identify individuals across the organization who may be ready within two or three years to replace the person currently occupying the position. Past performance, experience and current and transferable knowledge and skills are among the factors to consider.

3. Determine readiness by considering the timeline for each individual reviewed to successfully transition into a future position. With key assignments, training, coaching, mentoring and other intentional development opportunities, when might the candidate be ready? Map this out on a matrix similar to the one below.

SUCCESSION CANDIDATES AND READINESS

Position	**Current Team Member**	**Retention Risk** [H-M-L]	**Now**	**6–12 mo.**	**2–3 yrs.**
CFO	John Wilson	Medium	N/A	T. Evans (partner with John to gain working exposure to the Board)	J. Nguyen (xyz certification needed)

4. For each candidate, capture key demographics to ensure efforts are being made to build a diverse pipeline (revisit your organization-specific representation goals (e.g., Black and Latine/x representation in finance, Black women in senior leadership).

Succession Candidate	**Race/Ethnicity**	**Gender**	**Other Underrepresented Demographic(s)**
M. Ali	White	Woman	
C. Brown	White	Man	Veteran
T. Evans	Black	Woman	
J. Nguyen	Asian	Nonbinary	

TOOL #18: REDUCE BIAS IN PERFORMANCE MANAGEMENT

ESTABLISH

Check your biases. Use these practices to reduce bias in interpreting behavior and performance feedback.

- Start with a transparent, clear and measurable set of criteria for each position. Assess each individual in the same position based on these pre-determined criteria
- Before using vague concepts such as "culture fit" or "executive presence," clarify the skills, traits or behaviors you are really evaluating. Describe the feedback based on those observed skills and behaviors instead and ensure the same standards are applied consistently
- Give specific examples from the evaluation period to support your rating
- Consider who gets the benefit of the doubt in the performance process. Everyone—or no one
- Avoid making assumptions about what people want or are able to do based on their social identities (e.g., bandwidth for caregivers, ambitions of younger employees or older employees, or client sales opportunities for introverts)
- Set equal and fair expectations of everyone (e.g., do not insist that Susan should be 'likable' but not Marty)
- Give frequent and honest feedback to everyone who is evaluated to allow an equal opportunity to build on strengths or address development needs

See additional resources from the Center for WorkLife Law

- Bias Interrupters for Managers
- Identifying and Interrupting Bias in Performance Evaluations
- Performance Evaluation Checklist

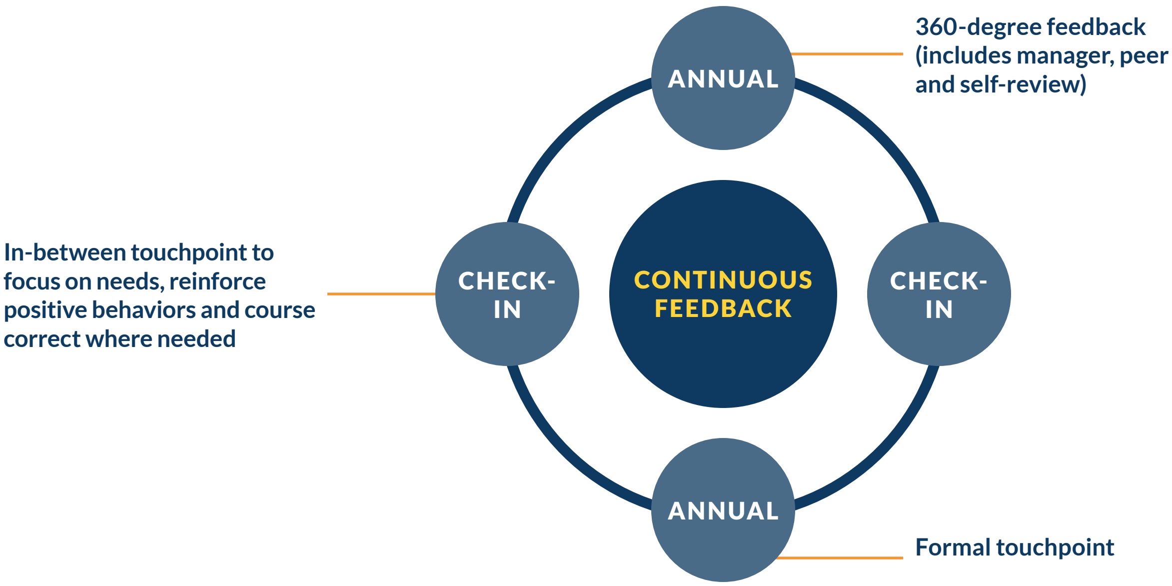
The following words can be subjective and biased toward women and other underrepresented groups. This can impact the reviewer's credibility and make improving the receiver's performance more challenging. It is best to provide specific examples of behaviors versus referencing subjective traits.

ABRASIVE, DIFFICULT, RUDE, AGGRESSIVE	UNPROFESSIONAL ATTIRE
PERSONALITY	MOTHER, FATHER, PARENT, CHILD, CAREGIVER
LOUD, OUTSPOKEN	GRAVITAS
QUIET, SHY	EXECUTIVE PRESENCE
BUBBLY, PERKY	POLISHED

TOOL #19: DEVELOPING A CONTINUOUS FEEDBACK PROCESS WITH 360 REVIEWS

GROW

Continuous feedback processes encourage several evaluation and coaching touchpoints throughout the performance cycle. Some continuous feedback systems are informal, while others are more structured. Some are limited to performance, while others include employee engagement. *Here's an example of what a continuous feedback cycle might look like.*



Cultures of continuous feedback are beneficial for several reasons:

- Shortened feedback loop, increasing opportunities for course-correcting in real time
- Reduced biases, especially recency (focusing on the most recent event) and primary bias (focusing on the first impression or event at the beginning of the performance cycle)
- Reduced anxiety and uncertainty about the feedback receiver
- Increased opportunity to deliver positive feedback and recognize team members
- Enhanced trust

Getting started with continuous feedback

1. Define the decision points (formality, types of feedback, rating systems and tools)
2. Communicate the purpose and goals of continuous feedback to your organization
3. Invest in the right tools/technology to facilitate the process. Consider investing in an HR information system that supports the structure of your performance and feedback process and stores insights from the individual, their peers, and leaders
4. Ensure that your employees are held accountable for the feedback provided. Track, follow up, and provide ongoing coaching for agreed-upon action steps
5. Each cycle and audit outcomes across all demographic groups for equity

TOOL #20: ORGANIZATIONAL-WIDE TALENT CALIBRATION

LEAD

Reviewing talent should be a reoccurring strategic activity for organizations, just as they review their financials.

Getting Started with Talent Calibration

1. **Get ready:** Each individual's performance feedback is completed during the organization's review cycle. Select a moderator for the upcoming talent review meeting who can keep leaders on task and facilitate with a degree of subjectivity (e.g., H.R./Talent team member vs. a manager within the group).
2. **Align and calibrate:** A group of managers across a department (or managers across the entire organization, depending on the workforce size) meets to discuss and validate the performance feedback of individuals on their teams, paying close attention to the performance assessments and contributions of people in similar roles or career levels.
3. **Center diversity:** During these calibration meetings, managers should closely examine how majority and underrepresented groups are assessed ***(Refer to Tool #18)*** to mitigate affinity and other biases. Managers should also use the opportunity to amplify the contributions and skills of groups more likely to be overlooked.
4. **Follow-up:** Managers identify each direct report's development and retention needs and plan to work with their teams to create the next steps and actions as needed.

Sample Template

[YEAR] Talent Review Meeting
Date:
Career Level:
Facilitator:

		Development Options					
Name	**Performance Outcome**	**Option 1**	**Notes**	**Option 2**	**Notes**	**Next Role**	**Additional Notes**

Possible performance outcomes based on your organization's performance management process:

- Strong performance
- Steady performance
- Needs development
- Performance risk

Possible development options based on your organization's performance management process:

- Promotion
- New role
- Stretch assignment
- Mentor/sponsor
- Training

TOOL #21: CREATING INCLUSIVE HIRING CRITERIA

ESTABLISH

While hiring is just one way to promote diversity within an organization, your approach matters. Whether an open position is new or a replacement for someone vacating a role, recruiters and hiring managers should know their actual needs for each job before they post an open role.

Start by reflecting and working with team members to answer guiding questions. Then, use Table A to organize your findings.

Guiding Questions for Developing Job Specs

Basic Questions

- What skills and traits often determine success in this role?
- What skills, both technical and soft, does the position require on Day 1? (Must-haves)
- How much formal education/ training is truly needed? Are there skills that can be trained or developed in alternate ways?
- What skills can be reasonably developed or learned on the job? ('Nice-to-haves)
- How has the position evolved over time if the opening is a replacement? What changes should be made to the responsibilities or desired skill set?

Consider Strong Past Hires

- What did they do well?
- What kind of work and educational experience did they have before this role?
- What comparable or transferable skills/ experiences should be considered in place of "traditional" educational credentials or real estate experience?

Value Proposition for the Hire

- What are the best parts of this position?
- What is the career path/ trajectory for a person in this role? What position might they grow into in 1 year, 3 years and 5 years?
- Why would a candidate from any background or identity want this opportunity?

Table A

SUMMARIZE KEY CHARACTERISTICS OF THE ROLE

	FUNCTIONAL RESPONSIBILITIES	CORE SKILLS	MINIMUM QUALIFICATIONS	OTHER
MUST-HAVES	Baseline duties of the role; non-negotiable tasks	Baseline skills, both technical and soft, needed on Day 1	Academic prerequisites, certifications and relevant work experience necessary to successfully perform the job	Other non-negotiable aspects of the role (location, travel, hours, etc.)
NICE-TO-HAVES	Additional duties and tasks that may expand the scope of responsibility or job performance	Skills that can reasonably be trained, coached and developed. 'Reasonably' means: • Use of available resources • Additional training in which the team is willing to invest • Within a defined, acceptable time period	Additional academic achievements, work experience and certifications that add to the candidate's skills and knowledge base	Additional characteristics about the role or candidate that are flexible but not necessary for success

TOOL #22: INCLUSIVE JOB DESCRIPTIONS AND CAREER (RECRUITMENT MARKETING)

ESTABLISH

Job Descriptions

Job descriptions are a great marketing and value proposition tool for candidates, highlighting why a position is a meaningful opportunity and allowing the candidate to see the company as one where they can take the next steps in their career.

Use these guiding questions to craft more candidate-centric and inclusive job descriptions. You can also use the same questions and principles to build content and copy for careers and other recruitment marketing materials.

	GUIDING QUESTIONS	BEST PRACTICES
COMPANY OVERVIEW	• What is your brand, EVP? • What are the vision, mission, values of the company? • What is the company culture like?	• Showcase the culture of the company, what it is like to work here; what makes the workplace inclusive • Emphasize why candidates should be excited to work here • Describe the company's commitment to and actions supporting inclusion and belonging
TEAM & ROLE OVERVIEW	• What does the team do and how does it fit in with the overarching goals of the company? • How does the team work? What is valued in the team? • What does it take to be successful on this team?	• Describe how the team works together and how a diversity of backgrounds, skillsets and opinions are valued • Focus on the impact and importance of the role within the larger organizational context • Draw attention to career growth and development
JOB TITLE & RESPONSIBILITIES	• Does the job title accurately describe the role and level? • What are the typical job duties and responsibilities? • What else will be expected of the hire?	• Give a realistic job preview – what is the job like day-to-day; what does a team member typically spend their time doing? • Share who the hire might work with and how
SKILLS, EXPERIENCE & QUALIFICATIONS	• What knowledge, skills, and experience are needed on Day 1? • What are the other qualifications for the role?	• Describe the knowledge, skills, experiences, attributes that are valued • Focus on the hard and soft skills that would make someone successful in this role • Eliminate 'nice-to-have' skills as long laundry lists discourage women from applying

Inclusive Language

Candidates draw conclusions about the workplace from a job description or career page, and the language or choice of words sets the tone of your organization's work culture.

Remember these suggestions as you craft your messaging:

- Keep the language open and inclusive: "We encourage sharing ideas…" and "Our team members come from many backgrounds…"
- Invite candidates from a broad range of experiences to explore your organization. Speak directly to them and avoid real estate (or related) jargon that may not be familiar to a broad group of people: "You will help build…" and "Your creativity will help us…."
- Be mindful of the ref behavioral traits referenced. Avoid gendered language and superlatives that may limit the candidate pool. Use a tool like Textio or Gender Decoder to identify problem spots in your word choices.
- Use inclusive words to mitigate gender bias.

EXCLUSIVE WORDS	INCLUSIVE WORDS
DETERMINED	DEDICATED
COMPETITIVE	DEPENDABLE
'BEST OF THE BEST'	PASSION
FAST-PACED	COLLABORATION
AMBITIOUS	COOPERATIVE
EXCLUSIVE	UNDERSTANDING

Highlight Inclusive Benefits and Perks

To the extent your organization offers benefits that may signal inclusion and care for people of various identity groups, include them in your employer branding, marketing and job descriptions.

- Generous parental or family leave policies
- Partner benefits (e.g., benefits that extend beyond marital status or along gender lines)
- Flexible work policies
- Tuition assistance
- Childcare or other caretaker support
- Employee assistance programs
- Mental/physical health benefits
- Other inclusive health benefits (e.g., fertility treatments or gender reassignment)
- Donation match for philanthropic contributions
- Sabbaticals and extended leaves

TOOL #23: INCLUSIVE SOURCING BASICS

ESTABLISH

Always be recruiting – avoid waiting until a position opens (and the countdown clock starts ticking) to source a new team member.

Continually network and engage candidates and develop a "keep warm" strategy to build the pipeline of potential hires.

"Keep Warm" strategy ideas:

- Focus on developing relationships – get to know the candidate, their motivations and aspirations; share a bit about you and why you feel your organization is a great workplace.
- Offer genuine advice about their career next steps.
- Help them build their networks and knowledge about your organization. Connect them to team members for informational interviews.
- Check in at least quarterly.

Focus on the top of the funnel - aim to have as diverse a talent pool as possible before you select candidates for interviews.

Research has shown that having at least two candidates from an underrepresented group significantly increases your odds of hiring underrepresented talent.

As you build your interview list, consider the diversity of the pool. To the extent that you have fewer than two candidates from an underrepresented group in the pipeline, revisit the applicant pool to ensure that all candidates who meet the pre-determined qualifications have been considered. You may also extend the sourcing outreach period to ensure a more diverse candidate group at the start of the interview process.

Check your referrals – referrals can be a great source of pre-vetted talent, and they can reinforce organizational biases and perpetuate "more of the same" candidate profiles.

From an equity perspective, most people refer to people within their networks who most often share similar backgrounds, identities and lived experiences. Consider, for a moment, who is disadvantaged in this practice. Limit bias toward referrals and ensure that all referrals are evaluated using the same process as non-referrals.

Create an inclusive referral initiative. Whether you already encourage employee referrals or are looking for new sourcing ideas, challenge your team members to consider their networks broadly when submitting referrals. Remind them of your commitment to building a more diverse, equitable and inclusive workplace and that your hiring effort is a great place to call in new and needed perspectives.

TOOL #24: STANDARDIZED INTERVIEWS

ESTABLISH

Standardized interviews are pre-planned questions every candidate interviewing for the same position is asked. They make for more effective assessments of defined competencies and job-related criteria, allow comparisons to be made more easily across candidates and critically keep individual biases in check.

Conducting Standardized Interviews

- Confirm the job-related criteria that need to be assessed
- Select interview questions that are aligned with each skill, competency or trait
- Avoid questions that are not related to the position or are difficult to evaluate objectively (e.g., "Tell me what you do for fun")
- Create an interviewer guide that outlines vetted questions (see an example of a candidate screening guide below)
- Ensure each interviewer has taken an interviewer skills course or has received guidance on interview basics, including how to structure the interview, when and how to use follow-up questions and how to evaluate candidates across cultures and identities and make inclusive decisions
- Always use an interview scorecard or evaluation guide to help interviewers stay focused on the selected criteria and calibrate interview performance across candidates

Sample Interviewer Question Guide (Candidate Screen Round)

ASSESSMENT OBJECTIVE	SAMPLE QUESTIONS
Basic Information and Candidate Interest	• Tell me a little about your professional background. • What interests you about the multifamily industry, our organization and this position?
Knowledge of Organization and Motivation	• What do you know about our work? • What are you looking for (or what is important) in your next role?
Technical and Functional Skills	• Tell me about some of your current projects and responsibilities.
Availability (as needed)	• If offered this position, how soon could you start? • Would you be comfortable with [x]% travel?
Salary Expectations	• The compensation range for this position is "x." Does that align with your expectations?

TOOL #25: STRATEGIC EXTERNAL PARTNERSHIPS

GROW

Building a diverse sourcing pipeline is an important part of any inclusive hiring process. A strong partnership strategy supports relationship-building with underrepresented communities alongside direct recruiting efforts (e.g., outreach on a professional platform like LinkedIn), job boards, social media posts and employee referrals.

Consider building a partnership strategy with organizations supporting and working with underrepresented or marginalized groups. Be sure that any partnerships you create are mutual. While building relationships and expanding your networks, consider what knowledge, mentorship or resources you can share with these organizations and their members.

Consider building a partnership strategy with organizations supporting and working with underrepresented or marginalized groups. Be sure that any partnerships you create are mutual.

Asian Real Estate Association of America (AREAA) https://areaa.org/	AREAA is dedicated to promoting sustainable homeownership opportunities in Asian American communities by creating a powerful national voice for housing and real estate professionals that serve this dynamic market.
Commercial Real Estate Women Network (CREW) https://crewnetwork.org/	CREW Network exists to transform the commercial real estate industry by advancing women globally.
Future Housing Leaders https://www.futurehousingleaders.com/	Future Housing Leaders connects college students to potential paid internships and entry-level job opportunities with top employers in the housing industry who are committed to diversity and inclusion. They also provide access to resources, including a peer network and educational materials to help students succeed. Future Housing Leaders reaches students across the country through various partnerships.
LGBTQ+ Real Estate Alliance https://realestatealliance.org/	The LGBTQ+ Real Estate Alliance was launched in June 2020 by leading real estate industry members. Influential real estate professionals and allies joined with other members of the LGBTQ+ community to create a new voice in real estate.
National Association of Gay and Lesbian Real Estate Professionals (NAGLREP) https://naglrep.com/	NAGLREP advocates on behalf of the rights of the lesbian, Gay, Bisexual and Transgender (LGBT) community regarding housing and discrimination laws. NAGLREP works to raise awareness through education and events to support fair housing for the LGBT community.
National Association of Hispanic Real Estate Professionals https://nahrep.org/	NAHREP is a purpose-driven organization propelled by a passionate combination of entrepreneurial spirit, cultural heritage and the advocacy of its members. Their mission is to advance sustainable Hispanic homeownership.
National Association of Real Estate Brokers (NAREB) https://www.nareb.com/	NAREB works on behalf of real estate professionals and homebuyers to: • Promote the highest standards of professional integrity; • Follow a strict code of real estate industry ethics; • Require professional certifications and accreditations; • Advocate for public policies that protect and expand sustainable homeownership; and • Partner with other real estate trade groups, civil rights organizations, fair and equal housing advocates, and financial services institutions to make sustainable homeownership for African Americans and other minorities realizable.
The Real Estate Associate Program (REAP) https://www.projectreap.org/	To advance DEI in the commercial real estate industry through education, mentorship and partnerships.
The Real Estate Executive Council (REEC) https://www.reec.org/	The REEC is the leading professional trade association formed to promote the interests of minority executives doing business in the commercial real estate industry. REEC strives to create opportunities for relationship development and access to information that will lead to increased business opportunities between and among members, as well as with majority-owned firms.
Real Estate Association of Latinx Professionals (REÁL) https://www.rea-l.org/	The REÁL's Real Estate Association of Latinx Professionals' mission is to increase visibility, advancement and equity for Latinx Professionals in commercial real estate by creating a multifaceted network representative of all professional levels across industry sectors.
USC Ross Minority Program in Real Estate https://lusk.usc.edu/ross	The USC Ross Minority Program in Real Estate is an educational platform providing critical skills to women and minorities. It allows graduates to participate in leadership roles and establish a pathway for success within the real estate industry. Their mission is to expand the pool of talented professionals and broaden options for investment in urban communities.

TOOL #26: DIVERSE INTERVIEW SLATES

LEAD

Diverse interview slates are those in which the candidate pool includes multiple candidates whose social identities are underrepresented within the team, department or organization.

Organizations can benefit from a checklist to ensure they are as inclusive as possible as they evaluate talent. The below tool provides potential goals to incorporate in inclusive interviewing.

IMPORTANT CONSIDERATION FOR RECRUITING INCLUSIVELY

Ensure thought has been given to how your organization is positioned to attract and retain underrepresented employees. Consider why candidates from underrepresented groups might want to work with your organization. Be ready to share that information and acknowledge where you may have work to do and how you are working toward your DEI commitments.

Diverse Slate Interview Readiness

Hiring criteria have been reviewed for equity and inclusion; all decision-makers are clear on the must-have and comparable or transferable skills/traits. ____________

A strategically wide net has been cast in our sourcing process. We have created inclusive job descriptions, posted them on job boards that promote diversity and partnered with organizations that support underrepresented groups. As applicable, we have asked our search firm partners to provide us with a diverse slate of candidates. ____________

A diverse panel of interviewers has been selected. ____________

All interviewers are clear on the important job-related criteria for the position. They have also taken interviewer skills training or have received guidance on the best way to structure interviews, ask questions and evaluate candidates inclusively and equitably. ____________

At least two (ideally three or more) candidates from an underrepresented group have been selected for interviews. We have considered intersectionality and have avoided “double-counting” in this process (e.g., a woman of color does not count twice). ____________

We have set up our debriefs to discuss the candidates’ qualifications for the position, focusing on their skills and attributes vs. their exact work histories or certifications. ____________

TOOL #27: SUPPLIER DIVERSITY MANUAL, PART 1: DEVELOP A PROGRAM FRAMEWORK

ESTABLISH

Supplier diversity is one way your organization can ensure its internal and external goals and values around DEI are aligned. The first step in building your organization's supplier diversity program is to develop a program framework.

The program framework includes the overall purpose, strategy, design and scope of the program. It should clarify how it is linked to the overall DEI goals and objectives of the organization. It should also cover the program's official policies and investments. Once your framework is completed, program information should be internally published and relevant policies or terms publicly posted on your website.

Developing a Supplier Diversity Statement

At the heart of your supplier diversity program (and the first part of your framework) should be a statement from your executive leadership about the organization's purpose and intention for the program.

GUIDING QUESTIONS FOR BUILDING A SUPPLIER DIVERSITY STATEMENT

- Why are we investing in a supplier diversity program?
- How does the program align with our overall commitments to our communities and shareholders?
- What do we hope to achieve or impact?

POTENTIAL OPPORTUNITIES

- Increased innovation
- New business opportunities
- Better or different services from vendors
- Improved customer satisfaction
- Economic inclusion and opportunity

Developing a Supplier Diversity Policy

Determine the right collaboration partners. When developing your supplier diversity policy, collaborate with other relevant functions, (e.g., legal, CSR], HR/DEI, marketing and procurement/purchasing for buying strategies and standard operating procedures/process changes. There may also be federal, state, or local laws around utilizing "minority"/women-owned or other historically excluded companies of which you should be aware (i.e., details around selection criteria).

Outline the decision-making process. Your policy will also need to clarify the decision-making process and chain of command, especially in decentralized organizations, where decision-making is made at the site or regional level. As a best practice, yYour organization can take measures to ensure that the decision-making process is free of biases by setting clear selection criteria and offering training to address the standards and expectations around various processes and decision-making.

Define the scope of the program. The scope of your supplier diversity program should be clearly outlined. Some of the key elements of scope include the following:

- **Clear guidelines on what constitutes a 'diverse supplier.'**
  - For example, a 'diverse supplier' is a business that is at least 51% owned and operated by an individual or individuals who are part of a historically underrepresented group. 'Diverse suppliers' can include the following categories, but the list may differ across local and state agencies:
  - Black, Latine/x and other historically excluded racial or ethnic groups
  - Persons from the LGBTQ+ community
  - Persons with disabilities
  - Veterans
  - Women

- **Certification requirements:**
  - Consider whether you will accept self-certified organizations or require certification from a government or independent agency. If you will require certification, decide which, if not all, agencies you will accept (e.g., National Minority Supplier Development Council (NMSDC), and Women's Business Enterprise National Council). Note: Depending on the geography/location of a project or funding sources, certification may be required. The audit process will identify this.
  - Consider the challenges many underrepresented business owners face that may discourage them from applying for certification (e.g., lengthy, complex processes, steep application costs and other associated fees for things like retaining legal counsel. If formal certification is not necessary, your organization may choose to forego the requirement or provide resources that aid vendors in obtaining these credentials.

- **Other requirements:**
  - In collaboration with any CSR efforts, determine your expectations for potential suppliers around their supplier diversity efforts.
  - Consider requiring diverse suppliers to be included in new requests for proposals that your company initiates.
  - Consider any additional requirements that should be built into procurement practices to promote inclusive sourcing (e.g., group panel involved in supplier decisions).

- **Reporting standards:**
  - As with any business strategy, establish the metrics you will track over time. For transparency purposes, it is recommended that the results be broken out by demographic categories instead of reporting consolidated or aggregated numbers.
  - If applicable, separate your tier 1 and tier 2 suppliers rather than include them in one metric.
  - If suppliers fall into multiple categories (e.g., Black and veteran-owned supplier), reflect them in each tracked category, but do not double-count when reporting total spending.

TIER 1 suppliers are your firm's contractors who directly support your firm's operations.

TIER 2 suppliers are the subcontractors your tier 1 suppliers contract to fulfill the needs of their client/customer.

- **Monetary and non-monetary investments and resources:**
  - Establish the monetary and non-monetary investments/resources needed to launch and maintain a successful program.
  - Considerations include:
    - The overall program budget and percentage of your total supplier spend within the budget
    - Persons responsible for developing and managing the program
    - Number of full-time employees needed to support the program
    - The organizational leaders and the scope of their involvement in the program
    - Process for holding leaders and other decision-makers accountable for goals
    - The internal staff training that will need to take place on the new supplier diversity program
    - The change management efforts needed to get stakeholder buy-in

TOOL #28: SUPPLIER DIVERSITY MANUAL, PART 2: EXECUTE THE PROGRAM

GROW

Once your supplier diversity framework ***(Refer to Tool #27)*** is complete, you are ready to execute the program.

Determine your needs and set goals. To successfully execute your supplier diversity program, you need to determine your specific organizational needs and establish goals to meet them. After establishing the firm's current state of supplier diversity, you can now measure progress toward your objectives ***(Refer to Tool #5)***.

Engage in inclusive supplier sourcing. You will also need to engage in inclusive sourcing by identifying where to find suppliers who have been historically excluded. Many organizations locate a diverse group of suppliers through certifying agencies or other underrepresented suppliers, while others may use a search engine. The NMHC Framework on Racial Equity and Economic Inclusion suggests leveraging existing industry associations (e.g., REEC, REAL, CREW).

In 2023, NMHC and an alliance of national commercial real estate trade associations launched the Commercial Real Estate Supplier Diversity (CREDS) initiative. CREDS will pilot an online supplier management platform that includes a comprehensive database of diverse suppliers. Organizations that subscribe to the platform can post purchase orders and other contracting opportunities and use the platform to measure and benchmark their spending. ***See Tool #28a (Supplier Diversity Inclusive Sourcing Guide)*** for supplier sourcing ideas.

Supplier Selection, Development and Evaluation

After establishing a diverse supplier sourcing strategy, consider how you will select, onboard, evaluate, and communicate with your suppliers.

Selection. Creating clear lines of responsibility and a timeframe for the supplier selection process is highly recommended. The exact timeframe will vary based on your organization's complexity and standard operating procedures.

Many organizations assign selection responsibility to someone in the procurement or purchasing department. Some apartment firms may wish to outsource some of the more time-consuming aspects of the process, such as spend tracking and analysis or tier 2 reporting. Depending on the complexity of your practices, you may wish to automate parts of the process through special software designed to support the assessment of 'diverse' suppliers.

If you have completed the *Supplier Diversity Baseline Assessment* referenced in the "Organization DEI Assessment Guide" ***(Refer to Tool #5)***, use the results to help define whether your firm is establishing, growing, or leading in its supplier diversity efforts. Depending on how your organization is structured, it may be beneficial and insightful to perform the baseline assessment at the corporate/enterprise and property management levels.

Development. Once the groundwork is laid, you should define the basic requirements for the bid. These requirements should be clearly listed in a request for proposal (RFP).

As part of a comprehensive supplier diversity strategy, your organization may wish to consider how its suppliers prioritize related elements of the supplier's workplace culture. This is a sample supplier workforce diversity survey that can be sent to potential suppliers or included as part of the RFP. The survey asks about the demographic makeup of the supplier's ownership group, leadership team, employees and vendors/suppliers.

The RFP should then be distributed to applicable agencies and contacts with a sufficient network of diverse suppliers.

Evaluation. Before you review RFP responses, it is important to have an effective tool with standardized criteria and a scoring system, such as Tool #28b: Sample Supplier Scorecard Template, to quickly compare suppliers against the organization's requirements. Be sure to include supplier background information, including any designations qualifying them as a 'diverse supplier.'

Finally, select the top candidates and pay close attention to the diversity of the suppliers and your organization's supplier diversity goals. Compare their qualifications and review candidates with any necessary decision makers. Ensure that any interviews or assessment discussions are standardized to mitigate bias and that each supplier is evaluated using the same criteria and scoring system.

Once suppliers are officially selected, it is important to ensure that they are set up for success by providing them with comprehensive training on your organization's standard operating procedures. Recommended considerations for any supplier onboarding process:

Set-up tasks
- Enter supplier information into your designated systems/software
- Grant necessary access/credentials
- Set up any self-serve options
- Announcement notifying respective stakeholders

Training should include, but should not be limited to:
- Key contacts and communication channels
- Internal processes and the use of applicable systems
- Registration/contracting process
- Performance and conduct standards
- Subcontracting policies and procedures
- Development and mentoring program
- Best practices/tips for success

Once suppliers are successfully onboarded and accustomed to your organization's standard operating procedures, you may connect them to relevant supplier development opportunities in which you are aware or engaged. Development involves providing training and, guidance and supporting resources to help them expand their capabilities.

Other methods of developing suppliers include the following:
- Connecting suppliers with customers
- Access to networking events or other industry opportunities
- Mentoring programs (assign ambassadors within the company who can mentor and support these suppliers)

Once suppliers are officially selected, it is important to ensure that they are set up for success by providing them with comprehensive training on your organization's standard operating procedures.

TOOL #28A: SUPPLIER SOURCING REFERENCE GUIDE

Commercial Real Estate Supplier Diversity (CREDS)
A pilot program launched in 2023 by NMHC and an alliance of national commercial real estate trade associations to pilot an online supplier management platform that includes a comprehensive database of diverse suppliers. Organizations that subscribe to the platform can post purchase orders and other contracting opportunities and use the platform to measure and benchmark their spending. Notably, diverse vendors, consultants, providers and other sellers can be listed in the database at no cost. (https://www.nmhc.org/CREDS)

Small Business Administration (SBA)
A federal agency whose primary role is the administrative regulating body and advocate of small business. In recent years, Congress has re-emphasized the advocacy function of SBA to bring about visible, substantive changes in public policy toward small businesses and to champion more effectively their cause. SBA's goal is to help small businesses survive in an economic marketplace dominated by large corporations. (www.sba.gov)

Office of Minority and Women Business Enterprises (OMWBE)
Offers certification for Washington's small businesses that meet the criteria for minority and women-owned business enterprises (M/WBE). OMWBE develops programs designed to improve the contributions of minority and women-owned small businesses to the Washington State economy. (http://www.omwbe.wa.gov/)

National Minority Supplier Development Council (NMSDC)
An organization comprised of a network of 39 affiliate regional councils across the country (including SCMBDC), all of whom provide minority business certification and business development opportunities. Since 1972, the goal of NMSDC has been to provide the direct link between corporate America and minority-owned businesses. NMSDC has over 3,500 corporate members and more than 15,000 certified minority owned businesses in its network. (http://www.nmsdcus.org/)

University of Washington Business Economic Development Center (BEDC)
Links students, faculty, and staff from the Michael G. Foster School of Business with a racially and ethnically diverse business and nonprofit community to expand students' knowledge and skills, help small businesses grow, create and retain jobs, open educational opportunities for under-represented minority students, and stimulate innovative economic development research. (http://bschool.washington.edu/BEDC/)

Women's Business Enterprise National Council (WBENC)
The nation's leading advocate of women-owned businesses as suppliers to America's corporations. It also is the largest third-party certifier of businesses owned and operated by women in the United States. WBENC works to foster diversity in the world of commerce with programs and policies designed to expand opportunities and eliminate barriers in the marketplace for women business owners. WBENC works with representatives of corporations to encourage the utilization and expansion of supplier/vendor diversity programs. (http://www.wbenc.org/)

Disability:In
The leading nonprofit resource for business disability inclusion worldwide. (https://disabilityin.org/)

TOOL #28B: SAMPLE SUPPLIER SCORECARD

Note: To access an interactive version of this spreadsheet, see the “Related Resources” at www.nmhc.org/DEIToolKit.

SUPPLIER SCORECARD TEMPLATE

CRITERIA CHECKLIST

*Prior to use, update criteria as needed to be consistent with RFP. Update basis for scoring to have qualitative scoring details.

Scores available from 1-5. Basis for scoring must be listed with specific examples.

1. Adherence to RFP Instructions	**supplier 1**	**supplier 2**	**supplier 3**	**BASIS FOR SCORE**
Timeliness	5	5	5	Arrived by deadline receives all points
Completeness	5	3	2	Completed sections in same order as RFP receives all points
Overall Quality & Level of Professionalism	2	4	3	Technically compliant and attractive receives all points
Overall Response	5	4	3	Overall quality very high receives all points
Average Score	4	4	3	
2. Company Information	**supplier 1**	**supplier 2**	**supplier 3**	**BASIS FOR SCORE**
Financial Viability	5	5	5	Proof of financial viability receives all points (i.e., Dun & Bradstreet Report)
Organizational Structure	1	5	4	Explained structure and org chart receives all points
Experience with Similar Companies	2	4	3	Proof of similar sized and focused companies experience receives all points
Service Department	5	4	3	Service department 24/7 with appropriate language capability receives all points
References	2	5	3	Positive references from four provided (checked) receives all points
Partnerships	5	4	3	Proven external partnerships receives all points
Desination/Classification				Meets criteria for underrepresented supplier, i.e., Minority-owned business
Average Score	3	5	4	
3. Project Understanding	**supplier 1**	**supplier 2**	**supplier 3**	**BASIS FOR SCORE**
Overall Comprehension of Project Objectives	5	5	5	Written section shows comprehension
Understanding of the Business Requirements	5	3	2	Written section shows comprehension
Understanding of the Business Vision	2	4	3	Written section shows comprehension
Average Score	4	4	3	
4. Requirements	**supplier 1**	**supplier 2**	**supplier 3**	**BASIS FOR SCORE**
Completeness of supplier Response	5	5	5	Response if fully technically compliant
supplier Ability to Meet Requirements	1	5	4	supplier details ability to meet requirements
Average Score	3	5	5	
5. Product Viability & History	**supplier 1**	**supplier 2**	**supplier 3**	**BASIS FOR SCORE**
Technology Is Sustainable	5	5	5	Track record of product history
Product Roadmap	5	3	2	Detailed roadmap for future product development
Product Development Life-Cycle	2	4	3	Life-cycle is realistic for product updates
Criteria Checklist				Scores available from 1-5. Basis for scoring must be listed with specific examples.
New Release Process	5	4	3	New release process is comprehensive
Average Score	4	4	3	

Continued on next page

6. Terms & Conditions	supplier 1	supplier 2	supplier 3	BASIS FOR SCORE
Detailed Buyer Duties	5	5	5	Buyer duties favorable
Terms & Conditions	1	5	4	Terms & conditions favorable
Purchase Agreement Details	2	4	3	Outlines purchase details
Average Score	3	5	4	

7. supplier Software Demonstration	supplier 1	supplier 2	supplier 3	BASIS FOR SCORE
Solution Is Integrated	5	5	5	Fully integrated solution receives full points
Aligns with Company Objectives	5	3	2	
Third-Party Products Shown	2	4	3	
Ease of Use	5	4	3	
System Performance	1	2	3	
Flow & Simplicity	5	2	3	
System Ability To Handle Requirements	2	1	4	
Flexibility, Tailorability, Extensibility	3	3	3	
Ability to Answer Questions	4	4	2	
Application Robustness	3	5	2	
Average Score	4	3	3	

8. Fee Summary	supplier 1	supplier 2	supplier 3	BASIS FOR SCORE
License Fees	5	5	5	
Maintenance Fees	1	5	4	
Purchase Timeline	2	4	3	
Licensing Period	5	4	3	
Other Fees	2	5	3	
Average Score	3	5	4	

*Change weights based on company requirements. Total score should = 1.00

CRITERIA SCORES	WEIGHT	supplier 1 WEIGHTED SCORE	supplier 2 WEIGHTED SCORE	supplier 3 WEIGHTED SCORE	NOTES
1. Adherence to RFP Instructions	0.05	0.21	0.20	0.16	
2. Company Information	0.05	0.67	0.90	0.70	
3. Project Understanding	0.20	1.20	1.20	1.00	
4. Requirements	0.30	0.15	0.25	0.23	
5. Product Viability & History	0.05	0.21	0.20	0.16	
6. Terms & Conditions	0.05	0.67	1.17	1.00	
7. supplier Demonstration	0.25	0.18	0.17	0.15	
8. Fee Summary	0.05	3.00	4.60	3.60	
Total Score	1.00	6.28	8.68	7.00	

TOOL #29: SUPPLIER DIVERSITY MANUAL, PART 3: EVALUATE, SUPPORT AND MAINTAIN THE PROGRAM

Once you have executed your supplier diversity program, you need to ensure it is sustainable. This involves consistent and thorough evaluation as well as ongoing support and maintenance.

Measurement. Organizations vary in how they manage and evaluate their programs. Smaller organizations, or those with relatively few suppliers, may use a spreadsheet where they input and track key metrics (like those outlined below). Larger firms or those with complex or matrixed vendor initiatives may use supplier diversity software. Regardless of how your organization manages its program, assess overall progress annually and make adjustments as needed.

The most common measurement is 'diverse spend,' determined by calculating the amount spent with 'diverse suppliers' as a percentage of the established target. It is also a good practice to calculate 'diverse supplier spend' as a percentage of total supplier spend. Specific metrics will be unique to each organization's industry, size, geographic location, etc., and will evolve over time.

Additional metrics that can be used include:

- Number of outreach events attended and hosted and subsequent leads generated
- Number of supplier development activities and subsequent leads generated
- Number of new 'diverse suppliers' with whom dollars have been spent
- Number of bids to which 'diverse suppliers' have been invited
- Cost savings from utilizing 'diverse suppliers' (due to increased competition)
- Effectiveness of the supplier onboarding process for new, diverse suppliers (via a post-onboarding survey)
- Second-tier contracting with diverse suppliers (subcontracting)
- Community impact-employment opportunities generated

Change Management. As you rebuild systems, structures and policies to support your new program vision better, you will likely be met with "change" resistance from various decision-makers, especially in decentralized organizations where long-term relationships with certain suppliers may have been in place for years. Consider a national property management organization where many supplier decisions are made at the regional or property levels. An intentional change management plan will need to be in place that considers long-term relationships between suppliers and regional, asset or property managers for the respective geography. You should ensure the change management team you established as part of the overall DEI strategy is consulted to help manage the change process.

Reporting. Finally, considering you have clearly defined performance expectations, you will need to establish a reporting framework to evaluate and communicate supplier performance using a tool such as the Sample Supplier Evaluation Form (Tool 29a).

It is important to remember that your suppliers are also evaluating your performance as an organization. Just as you measure employee engagement, you should also measure supplier engagement. This can be done formally or informally through a simple survey, focus group or one-on-one interaction with a designated individual.

TOOL #29A: SUPPLIER PERFORMANCE EVALUATION TEMPLATE

Note: To access an interactive version of this spreadsheet, see the "Related Resources" at www.nmhc.org/DEIToolKit.

SUPPLIER PERFORMANCE EVALUATION TEMPLATE

VENDOR NAME		CONTRACT REFERENCE NUMBER	
CONTRACT DESCRIPTION		TIME PERIOD COVERED	
EVALUATING PARTY NAME		DATE EVALUATION COMPLETED	

SCORE KEY

5	Very Good; Exceeds expectations
4	Good; Meets expectations
3	Standard; Meets most expectations
2	Adequate; Meets some expectations
1	Unsatisfactory; Misses most expectations
0	Substandard; Falls far below expectations
N/A	Not Applicable

EVALUATION CATEGORY	PERFORMANCE EXPECTATIONS	SCORE	CORRECTIVE ACTION DESCRIPTION – IF NECESSARY –	ADDITIONAL INFO
ADMINISTRATION	Required documentation / reports submitted			
	Invoices submitted on time			
	Invoice accuracy			
	Contract completed on budget			
	Competitive change order pricing provided			
	Financial aspects monitored and tracked			
ADMINISTRATION TOTAL SCORE				

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EVALUATION CATEGORY	PERFORMANCE EXPECTATIONS	SCORE	CORRECTIVE ACTION DESCRIPTION – IF NECESSARY –	ADDITIONAL INFO
SCOPE	Deliverable completed to quality standards			
	Adhered to specifications of contract			
	Demonstrated flexibility			
	Provided innovative input			
	Substantiated change orders			
	Corrections made quickly when necessary			
	Problem areas recognized and corrected			
SCOPE TOTAL SCORE				
STAFF	Adequate staff present			
	Staff is professional and competent			
STAFF TOTAL SCORE				

EVALUATION CATEGORY	PERFORMANCE EXPECTATIONS	SCORE	CORRECTIVE ACTION DESCRIPTION – IF NECESSARY –	ADDITIONAL INFO
COMMUNICATIONS	Communicated effectively and openly			
	Positive and professional character and conduct			
COMMUNICATIONS TOTAL SCORE				
SCHEDULE	Work efficiently planned			
	Provides required schedules and plans			
	Milestones met			
SCHEDULE TOTAL SCORE				
HEALTH & SAFETY	OSHA compliant			
	Other laws compliant			
	Other bylaws compliant			
HEALTH & SAFETY TOTAL SCORE				
TOTAL SCORE				

OVERALL EVALUATION COMMENTS

NMHC
DIVERSITY
EQUITY &
INCLUSION
TOOLKIT