

**Coalition for Diversity in Real Estate
Company Diversity, Equity, & Inclusion (DEI) Worksheet – Detailed Version**

Overview: This worksheet is a tool for companies to develop and track Diversity, Equity, and Inclusion. Please don't feel intimidated, as no company has perfected all areas of DEI. The goal is to identify and celebrate any progress made, as well as map out a few steps to take that can be most impactful to your organization.

"If a gold medal in the Olympics is the only grade that passes, you do not want to ever take your first gymnastics class." -Richard Thaler

Best Practice Tips:

- Any working team can start the work. Senior leadership involvement at some stage is ideal.
- This can be refreshed periodically to track practice and update goals.
- Can be applied to smaller divisions within very large organizations.

Current DEI Status

Item	Yes	No / Don't Know	Plan To Within 12-18 months
Diversity Statistics Measurement	Yes	No / Don't Know	Plan To Within 12-18 months
Has the company measured diversity statistics of your employees?			
Has the company measured % of your employees by gender?			
Has the company measured % of your employees by racial/ethnic groups?			
Has the company measured % diversity by seniority levels?			
Has the company measured retention rates of your employees from underrepresented groups versus majority groups?			
Does the company conduct employee engagement / satisfactions surveys to assess companywide culture?			
Are the stats shared with senior leadership?			
Are the stats shared to all employees?			
Are any stats shared externally?			
Performance Assessments	Yes	No / Don't Know	Plan To Within 12-18 months
Has your company reviewed your performance assessment process to find ways to reduce bias?			
Do you have performance assessment templates with customized metrics for each position, to improve consistency of assessments and reduce bias?			

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Are assessors required to provide specific and detailed comments on performance?			
Are assessments reviewed for consistency and specificity? Examples include checking that feedback is specific, feedback is about performance not style, screening for common bias words, level set reviews of each level.			
Do you include multiple points of view in performance assessments, such as 360 reviews, review panels?			
Is an individual's contributions to advancing inclusion and belonging within the company included in all performance appraisals?			
Hiring and Promotions	Yes	No / Don't Know	Plan To Within 12-18 months
Does the company have specific processes to widen hiring searches to recruit from underrepresented groups?			
Does each position have clear job responsibilities and metrics that are realistic? To both measure applicants consistently and encourage a broad range of qualified candidates.			
For promotions, is there a consistent process to solicit internal applicants and evaluate candidates?			
Has the company evaluated your talent pipelines internally to develop a succession plan that addresses any diversity imbalances? Consider what roles are most common pipelines for senior management? Are you developing pipeline that is diverse in those areas?			
Mentoring & Sponsorship	Yes	No / Don't Know	Plan To Within 12-18 months
Does the company have any formal mentorship programs to mentor &/or sponsor employees from underrepresented groups?			
Does the company encourage managers and senior leaders deliberately balance access to mentorship and informal networking for all employees? To reduce bias to mentor people most like them.			
Does the company have any employee engagement, retention, and advancement programs for staff from underrepresented groups? Such as employee resource or affinity groups.			
Policies	Yes	No / Don't Know	Plan To Within 12-18 months
Does the company have a paid family leave policy?			
Does the company have procedures for reporting and investigating harassment and/or discrimination?			
Has the company reviewed compensation for equity across demographic groups?			

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Does the company provide employees DEI training such as inclusive leadership, reducing unconscious bias and/or harassment?			
External Diversity Initiatives	Yes	No / Don't Know	Plan To Within 12-18 months
Does the company participate in any industry DEI programs?			
Does the company engage in any programs focused on addressing diversity imbalances in the talent pipeline? Such as internship programs, school career outreach/mentorship programs.			
Does the company engage in efforts with external companies/parties to encourage diversity of teams? Such as in process in evaluating vendors, clients.			

DEI Reflection

The following questions are intended to help companies reflect on key DEI successes and areas for improvement.

- What areas has the company been most successful in?
- How can you celebrate that progress?
- What areas could the company focus on for most impact (ie greatest opportunity areas)?

DEI Goals

- What are our DEI actions to take in the next year?
- What are our DEI actions/goals for mid-term (2-5 years)?
- What are our long-term DEI actions/goals (5+ years)?
- Who is responsible creating and meeting the company's DEI goals?
- Who is responsible for execution of DEI initiatives? How are they resourced / rewarded along with other performance deliverables?
- What challenges/pitfalls does the company anticipate encountering?