self-assessment:

Diversity, Equity, and Inclusion

What is diversity, equity, and inclusion?

While often used together to describe related principles, diversity, equity, and inclusion mean different things. Diversity is appreciating the similarities and differences among individuals. Inclusion is making decisions through processes that engage, embrace, and leverage diverse perspectives. Equity is fostering a culture and creating systems where people thrive, and everyone gets what they need given where they are starting from.

Equity, for the purposes of this development guide, recognizes that needs vary across different populations. Influencing factors may include a project's location and development goals. Concurrently, it recognizes that some populations experience acute housing challenges. Populations may include racial and ethnic groups; veterans; older adults; people who have experienced homelessness; neurodiverse people, and those with special needs. For developers, this means working to understand the role of housing and any associated services in people's lives, seeking to meet them where they are. Community engagement throughout the development process can help build awareness, understanding, and trust and help support more positive outcomes.

Why use a diversity, equity, and inclusion lens?

Housing serves as a platform for individual and community transformation. Using a diversity, equity, and inclusion lens acknowledges how a safe, stable home can impact people's lives. It also acknowledges the role that systemic factors, such as federal, state, and local action, inaction, and policies; resource allocation and access; and access to property ownership has played in creating and perpetuating disparities in the housing realm. Using a diversity, equity, and inclusion lens may help you to both actively identify and work to address these disparities in projects and within your organization.

About this worksheet

This self-assessment will guide you in examining three different orientations toward equity during the development process:

- **Organization:** What is your organization's current orientation toward diversity, equity, and inclusion?

- **Development:** What is your proposed development's orientation toward diversity, equity, and inclusion?

- **Community and residents:** How can you engage authentically with those whom you intend to serve by your proposed development and the broader community to advance equity in ways that matter to them?

This worksheet is designed for you to take a candid look at your organization and proposed development. As a result, there are no "right" or "wrong" answers to these questions. Your reflections can help identify ways to advance equity as you make decisions about a proposed project, as well as highlight areas to build collective awareness and embed equity more deeply into your organization over time.

Ways to use this worksheet

- **Create awareness.** Understand how you individually or your organization currently thinks about diversity, equity, and inclusion principles and how they guide your work.

- **Build collective understanding and agreement across a project team.** Assess your project partners' orientation toward diversity, equity, and inclusion and build a shared understanding of these principles across your team.

- **Define aspects of your proposed project.** Design parts of your project, such as site selection, building design, operations, and community and resident engagement. Use the worksheet to confirm your assumptions about a proposed project, as well as generate new ideas to make a project more equitable.

Self-assessment Questions

Consider the following questions for your organization and proposed development project.

Questions related to your organization

- **Does your organization's mission or values (implicitly or explicitly) support outcomes related to diversity, equity, and inclusion?** If so, do executive leaders, staff, and board members agree on these goals? How does your organization build accountability among executive leaders, staff, and board members to use a DEI lens in organizational decisions?

- **What policies or procedures does your organization use to guide diversity, equity, and inclusion efforts?** Has your organization set internal or external metrics for its DEI efforts? How does your organization track and report progress on its DEI efforts?

- **Has your organization sought to better understand the individuals who you serve and their lived experiences**

communities? If so, what were the main lessons from this examination?

- **Consider the composition of your current executive leaders and staff.** In what ways do they relate to the populations and communities that your past and ongoing work typically support? To what extent do they have:
  - issue experience (directly affected by the issue being addressed),
  - demographic relevance (reflect the intended residents or community being served),
  - direct engagement (work or have worked directly or indirectly with the intended residents or community being served), and
  - geographic relevance (live or have lived in the community being served)?

- **Consider the composition of your current board of directors.** In what ways do they relate to the populations and communities that your past and ongoing work typically support? To what extent do they have:
  - issue experience (directly affected by the issue being addressed),
  - demographic relevance (reflect the intended residents or community being served),
  - direct engagement (work or have worked directly or indirectly with the intended residents or community being served), and
  - geographic relevance (live or have lived in the community being served)?

Reflection space:

What is your organization's current orientation toward diversity, equity, and inclusion?

Key strengths and opportunities:
Based on your reflection, what are some strengths of your organization's DEI efforts? List your top three strengths:

1.
2.
3.

What opportunities do you see to increase your organization's orientation toward diversity, equity, and inclusion? List your top three opportunities:

1.
2.
3.

Questions related to your development

Understanding housing needs

- Does the analysis in your housing needs assessment disaggregate housing needs by specific groups to understand disparities or unmet needs (income, race or ethnicity, age, household type, gender, and ability)?

- Does your understanding of the identified housing needs incorporate the lived experiences (meaning the direct experiences of people and their significance in individuals' lives) of groups with housing needs?

- Does your project team have awareness or understanding of the systemic factors (for instance, historical or present-day policies or practices) that have created or perpetuate the disparities or unmet needs identified in your housing needs assessment?

Aligning needs and development model

- How will the development address systemic factors that have created or perpetuate the housing needs being addressed?

For the following questions, consider the intended residents of your proposed project*:*

- Do the development's rent levels or sales prices align with the intended residents' incomes?

- How will you tailor design or building features to residents' primary needs and desires?

- How will you increase access to essential services for residents via site location or direct provision?

- How will you tailor onsite resident services, if needed, to resident needs and desires? How will residents be involved in shaping and delivering those services?

- Will the development provide opportunities to build assets among residents?

Partnering

- How can procurement practices for this development increase diversity, equity, and inclusion relative to project goals or broader organizational goals?

For the following questions, consider the potential partners you may work with on your project team:

- Do their organization's mission or values support (implicitly or explicitly) outcomes related to diversity, equity, and inclusion? If so, is there general agreement on these goals as part of the development?

- In what ways do they relate to the populations and communities that your proposed project will support? To what extent do they have:
  - issue experience (directly affected by the issue being addressed),
  - demographic relevance (reflect the intended residents or community being served),
  - direct engagement (work or have worked directly or indirectly with the intended residents or community being served), and
  - geographic relevance (live or have lived in the community being served)?

Operating the property

- **Consider your property management staff.** In what ways do they relate to the populations and communities that your proposed project will support? To what extent do they have:
  - issue experience (directly affected by the issue being addressed),
  - demographic relevance (reflect the intended residents or community being served),
  - direct engagement (work or have worked directly or indirectly with the intended residents or community being served), and
  - geographic relevance (live or have lived in the community being served)?

- How will the property incorporate resident-centered property management practices that align with intended residents' needs? Consider the following:
  - Resident management plans with an explicit commitment to diversity, equity, and inclusion
  - Culturally relevant and inclusive communications (including language access)
  - Culturally relevant and inclusive communications programming
  - Use of trauma-informed practices

- What outreach and communication tactics will be used as part of the property's marketing plan to reach its intended residents?

- How can you improve overall accessibility and ease of the application process or other documentation needed from your

intended residents?

For rental properties only, consider the following questions:

- Will you include information about state and local (if applicable) tenants' rights with lease materials?

- Does your standard lease language outline alternatives to evictions (such as repayment plans) and a process to address tenant complaints? If not, what alternatives could you develop?

- For these alternatives, do you have a clear process for tenants to use them? Have you worked with tenants to identify any improvements to this process?

Reflection space:

✎ What is your proposed development's orientation toward diversity, equity, and inclusion?

Key strengths and opportunities

✎ Based on your answers, what are some strengths of your development relative to your organization's DEI efforts? List your development's top three strengths:

1.
2.
3.

✎ What opportunities do you see to increase your development's orientation toward diversity, equity, and inclusion? List your top three opportunities:

1.
2.
3.

Questions about community and residents
Understanding history and context

- How have history and cultural context shaped the community of your development and the experiences of intended residents?

- How does this history and cultural context relate to the systemic factors (for instance, historical or present-day policies or practices) contributing to the disparities or unmet housing needs being addressed by the development?

- Who else has a stake in the development? What types of power do they have in and out of the community where the proposed development will occur?

- How will your organization navigate differences between the priorities and perspectives of community members, the intended residents, and your own organization?

Engaging community residents

- How will community members and intended residents be involved in shaping the development? How will you compensate them for their time and expertise?

- What proactive outreach and communication tactics will be used to promote frequent and transparent interactions with community members and intended residents?

- Based on community members' input, how can the development promote long-term self-sufficiency among its intended residents?

Identifying opportunities for increased equity

- What adverse impacts or unintended consequences could the development have on the surrounding community and intended residents? How can you mitigate or prevent these adverse impacts?

- Can the development be designed to provide additional benefits beyond housing to community members and intended residents? Consider the following:
  - Partnerships with workforce development initiatives
  - Procurement from local business located in or near the development
  - Opportunities to build capacity of local housing organizations or developers
  - Provision of community equity endowments
  - Provision of additional community benefits (such as new facilities or improvements)

- How will these additional benefits be advertised and informed by community members and intended residents?

- How will these additional benefits be tracked and reported to community members and intended residents?

How can you engage authentically with the persons being served by your proposed development and the broader community to advance equity in ways that matter to them?

Key strengths and opportunities:

Based on your reflection, what are some strengths of your organization's DEI efforts? List your top three strengths:

1.

2.

3.

What opportunities do you see to increase your organization's orientation toward diversity, equity, and inclusion? List your top three opportunities:

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3.