



Urban Land **Charlotte**  
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Going from Conversation  
to Action:  
Diversity & Inclusion  
**CASE STUDIES**

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# Going from Conversation to Action: Diversity and Inclusion

Diversity and inclusion are two very important values to Wells Fargo. Wells Fargo Commercial Real Estate engages in a variety of different diversity and inclusion initiatives, spearheaded internally through our Development & Engagement Council (“DEC”), comprised of approximately 30-40 individuals across the CRE platform. Through the DEC, Wells Fargo CRE focuses on recruiting and retention, community service, and development of our team members.

- City of Charlotte – Planning, Design & Development
- Crescent Communities
- JLL
- Wells Fargo

Other companies and individuals are encouraged to share their examples. To submit your case study, go to <http://ow.ly/y4Gf30mDTgW>



**Urban Land  
Institute**

**Charlotte**

**Women's Leadership Initiative**

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## Category: Internal - Hiring Practices & Retention

### Wells Fargo

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With recruitment, we engage with potential candidates (mostly undergraduates) through on-campus and off-campus recruiting activities, including networking and recruiting events with non-traditional student interest groups that may not be reached through traditional business, finance, and real estate channels. By focusing on a core group of schools, we develop longer term relationships and can reach those students more effectively than simply doing a general hiring event through a career services office. We have also engaged in sponsorships with local campus groups, with one example being a newly formed “Women In Business” chapter at the University of Wisconsin where Wells Fargo has provided some financial support for events. We also participate in Wells Fargo’s enterprise intern hiring forums that reach a diverse pool of candidates nationally. The 2-3 day forums give more exposure to candidates in learning about Wells Fargo, and assist the various lines of business in finding the right candidates for their needs.

On the retention and development side, there is a focus on maintaining existing diverse talent and developing that talent throughout a career.

- The DEC has sponsored a targeted Mentorship program, matching a young team member with a more experienced team member in a formal mentorship program.
- The DEC also sponsors a Women’s Initiative platform, where local CRE team members develop local programming on topics important to that group. It is inclusive (men are often invited), and topics can range from discussions around gender differences and issues in the workplace, to more focused discussions on business or continued learning opportunities for all.
- As an extension of our recruiting efforts, a special emphasis has been placed on developing strong relationships with our junior team members in their early careers. Each new hire (intern or full time analyst) is matched with a “Junior Link” and a “Senior Link” to serve as informal resources for the analyst. A Junior Link may help with the normal day-to-day job-related questions, and a Senior Link may provide more high level guidance on navigating a career or expanding a network.

Finally, community service plays a large role in Wells Fargo CRE through the DEC's annual Volunteer Project. Each September, CRE team members are encouraged to volunteer within their local communities with other CRE team members. The goal of the Volunteer Project is not only to serve our local communities, but also to develop stronger relationships across CRE by getting team members working on a goal with others beyond their normal team.

**What is your goal for starting this initiative?**

The DEC was established in 2012 to actively focus on and drive initiatives related to talent acquisition and retention, development and engagement with diversity incorporated throughout all efforts. The DEC focuses on diversity and inclusion by being leaders on these initiatives and sparking open and frequent dialogue about these topics with all team members and management.

**What worked well?**

The Early Talent recruiting efforts have been very successful. We do not have or encourage quotas, but through data tracking and open dialogue, we have shown real success in attracting high performing early talent to Wells Fargo CRE through a specific focus on diversity. We hope this will continue to prove successful through retention of this talent over time.

The Women's Initiative has generated a lot of conversation and engagement across the entire platform about issues facing women in CRE.

The Volunteer Project just completed its third year, where team members committed nearly 3,000 volunteer hours during the month of September. Local teams have been more engaged throughout the year in community service efforts. These efforts show significant team work across the platform, and have generated many new relationships internally that may not have been forged.

**What could be improved?**

Continuing to expand awareness of the DEC and engaging as many team members as possible.

**What are your next steps?**

The DEC continues to grow its efforts through existing programming, as well as evaluate new ideas for future programming. We are always looking for new, creative and effective ways to development and engage our team members.

## Category: External - Community Outreach

# Crescent Communities

Crescent Communities has launched an initiative to enhance opportunities for minority, women, and small businesses to be included in the bidding process for our company's developments. As part of the initiative, Crescent Communities hosted and plans to host events, forums, and information sessions to inform the sub-contracting community about our projects, and arrange introductory sessions to match MWSBE business with

larger GCs. Crescent hosted its most recent and third event, a Diversity & Inclusion Forum, on 7/18/18 to bring together MWSBE businesses to learn more about our business units and current project opportunities. These developments include Ally Charlotte Center and The River District, two high-profile projects for the company and community.



### **How does this create a different conversation around diversity and inclusion?**

While Crescent wants to address the overarching goal of increased MWSBE participation in the private sector, the first conversation that we want to start is about the available opportunities for MWSBE businesses. Historically, minority, women, and small firms struggle to find their "seat at the table," so Crescent's conversation is intended to bridge that gap and educate those firms about projects, expectations, and processes.

**What was your goal for starting this initiative?**

Our overarching goal for the initiative is to open a line of dialogue in which we'll communicate project needs and opportunities. Having this consistent and clear communication with MWSBE contractors will ultimately translate to improvement in workforce diversity and shared value for Crescent, the city, and a mix of smaller businesses.

**What worked well?**

Attendance. We had an overwhelming turnout. The participation and candid conversation was high.

**What could be improved (share lessons learned)?**

The next steps are not immediate in our business, so follow up has appeared slow. We are in process of planning our fourth event, a Development 101 session, to share more about the development industry and educate the construction subcontractors we are engaging in our process.

**What are your next steps?**

Planning future events and outreach. Our goal is to have 2-3 events per year while making connection through our websites, and on each project we commence in the Charlotte market.

**Category: Internal - Professional Development  
External - Community Outreach/Stakeholder &  
Community Forums**

**City of Charlotte - Planning, Design &  
Development**

We have encouraged our staff particularly in Urban Design and Long Range Planning to be innovative in community engagement to build better community relationships and build great places in our community that are inclusive of a diversity of people. This work has been under way for the past 3 years and we have learned what works best in Charlotte by action through pilot programs. These projects are typically cross-departmental but typically include leadership from PDD staff and have been made possible by philanthropic funding sources. These projects include public space improvement projects that turn community input into transformation of place in short timeframes (Placemaking, GovPorch, NoBarriers), temporary public space projects that transform the perception of a place and attract new investments and ways of thinking about how a space is used and collects community improvement data (Open Streets 704, Eastland Rising, Better Block), equips residents with knowledge of how planning and design works (Civic Leadership Academy and Community Planning Academy), and uses design thinking to work with the community to achieve their programmatic goals in collaboration with various partner departments and agencies (North End Smart District, Stitch Together CLT, Social Senior Project).



We have also put staff through training from Government Alliance for Race and Equity (GARE), Community Building Initiative (CBI), and Race Matters for Juvenile Justice (RMJJ) as well as encouraged reading of “Leading on Opportunity Report”, “Sorting out the New South City”, “The Color of Law”, and “Money Rock” for staff to better understand the impact of planning on community members’ quality of life, improve consciousness to mitigate impacts of implicit bias in work, and help shape better strategies for our practices, policies, and regulations.

### **How did it change behavior or thinking?**

The pilot programs have helped staff better navigate the complexity of the system to create great places in the community that are more inclusive and reflect better diversity. It has resulted in a diversity of neighborhoods participating in Placemaking, new inclusive investments and collaborations to create great places in diverse neighborhoods, and increased effective participation of diverse communities in development and planning processes.

Staff who participated in a combination of efforts (GARE, CBI, RMJJ, and self-driven learning) have demonstrated a commitment to understand the impacts of their decisions to the city's inclusivity and diversity. It has led to staff intentionally charting out strategies to improve outcomes in a way that race and zip code are not predictors of health, longevity, employment, educational attainment, income, and access to daily goods, services and support. It has also led to thoughtfulness of approach and messaging to community engagement to be more inclusive and promote diversity of voices in decision making process as well as to use engagement as a tool to build social capital.

### **What is your goal for starting this initiative?**

The goal of this initiative is to proactively create, preserve, and facilitate great places with the community while being intentionally inclusive. The thought is that this co-creates a shared sense of ownership and responsibility and the localized knowledge and citywide engagement will lead to more equitable distribution of the benefits and burdens of growth in our practice, policies, and regulation creating a more balanced and sustainable city.

### **What worked well:**

Building real relationships with community members to the point of have two-way communications on projects and initiatives outside of the designated project. This helps the community achieve their goals and it helps the City get a perspective that is often underrepresented in decision making. It has increased participation and improved perception of the planning department. This work is also bringing more internal inclusion in the department's projects to promote diversity in representation of decisions on our projects and collaboration between different departments and improved service delivery. This initiative also resulted in more communities participating in placemaking as well as new funding from the City Manager to invest in action to improve public spaces throughout the city. It is building the brand of a city that gets things done in collaboration with the community and effective data collection.



**What could be improved (lessons learned):**

Addressing the disconnect between community leaders and most residents who do indicate that they care but feel disenfranchised. Thorough and diverse outreach and communication tactics are needed to move information through the community.

Avoid meeting fatigue by improving coordination of data needs and making the best use of participants' time to achieve community goals through production and building social capital of connections to resources and people needed.

Innovative and inclusive, meaningful community engagement is resource demanding and staffing continues to be a challenge. Training more staff in other areas will be important to sustain the initiative. Also carving out participating staff time to capture, report, and communicate (publish or present) findings to others is important to institutionalize the initiative and replicate success.

**Next Steps:**

We will apply the lessons learned equity, diversity, and inclusion in community engagement to our upcoming efforts with the Charlotte Future 2040 Comprehensive Plan. This will affect where we plan for growth and our policy around growth as well as how we engage the community to arrive at a more inclusive and more resilient and winning community. Our next step with Charlotte Future 2040 is to scope services with the Comprehensive Plan consultant MIG and their team. This includes establishing a Community engagement plan and starting to develop metrics to measure our success around inclusive events and equitable policies.

## Category: Internal - Team Building

### JLL

Diversity and inclusion is not about creating advantages for some - it is about removing barriers for all. Our most valuable asset is our people, and we take pride in a culture that is inclusive of all backgrounds and experiences. More than 7,500 employees in over 200 locations take part in JLL's Employee Resource Groups that focus on our African Americans, Latinos, LGBT, women, veteran and employees of all abilities. These voluntary, employee-led groups provide a platform to celebrate diversity, surface great ideas, network with peers and make meaningful connections across the organization. They are a great source for learning about the cultures that make up JLL and for helping to foster inclusive teams. This case study will focus on the Women's Business Network (WBN) and their professional development initiative. The WBN's mission is to empower a culture of gender partnership to attract, develop, and retain professional women in the marketplace. Nationally, the WBN Americas Chapter hosts monthly professional development calls averaging more than 600 attendees per call. Locally, the Carolinas Chapter of JLL has committed to focus on professional development to help our employees live our brand promise of achieving their ambitions. We invest in high value diverse employees to create a leadership talent pipeline through development opportunities, training programs and leadership access.



It allows people to know that they have a voice and that it is heard. JLL's D&I initiatives are targeted programs that ensure all people have the skills and resources needed to grow their careers. As a result, we have seen a steady increase in overall ethnic minority hires over the past two years (50%

### **What was your goal for starting this initiative?**

To organize a platform that leverages diversity, ultimately enhancing the development of women in the workplace by creating networking opportunities with peers, meaningful connections across the organization and professional growth.

### **What worked well?**

- Various professional development opportunities created to include the following events:
- Book club (Presence, by Amy Cuddy)
- Bi-annual TED Talks (How to Speak Up for Yourself and The Power of Introverts)
- Executive Presence training
- Achieving Ambitions and productivity workshops
- A presentation by JLL's Chief Economist, Ryan Severino.

Employee feedback is solicited after each event and the common theme is how much everyone values the different development opportunities that JLL makes available.

### **What could be improved (share lessons learned)?**

Better collaboration between other Employee Resource Groups to see how we can improve existing partnerships and capture a wider employee base.

### **What are your next steps?**

Network with other Employee Resource Group leaders to leverage each other and incorporate new ideas. Our goal is to continuously improve our organization with opportunities for individuals. You can find out more about JLL's Diversity and Inclusion initiatives at <http://www.diversityatjll.com/>.