

**CalSTRS/Guidehouse Pre-Reads for the July Board**

June 14, 2023

**Project Overview**

- **Overview of Global Diversity, Equity & Inclusion Benchmarks (GDEIB):**
  - The Centre for Global Inclusion created the Global Diversity, Equity & Inclusion Benchmarks (GDEIB) as standards for organizations around the world. GDEIB includes 15 categories and five (5) levels, which are sorted into four (4) groupings: Foundation, Bridging, Internal, and External.
  - Each of the 15 categories can be assessed one (1) of five (5) levels as noted in the table below. Level Five (5): Best Practice represents global best practices in DEI.
  - GDEIB helps organizations to:
    - Realize the depth, breadth, and systemic nature of DEI practices
    - Assess the current state of DEI
    - Determine organizational strategy
    - Measure progress in managing diversity, equity, and fostering inclusion\*

GDEIB Categories	GDEIB Levels
<ol style="list-style-type: none"> <li>1. Vision, Strategy, and Business Impact</li> <li>2. Leadership and Accountability</li> <li>3. DEI Structure and Implementation</li> <li>4. Recruitment</li> <li>5. Advancement and Retention</li> <li>6. Job Design, Classification, and Compensation</li> <li>7. Work-life Integration, Flexibility, and Benefits</li> <li>8. Assessment, Measurement, and Research</li> <li>9. DEI Communications</li> <li>10. DEI Learning and Development</li> <li>11. Connecting DEI and Sustainability</li> <li>12. Community, Government Relations, and Philanthropy</li> <li>13. Services and Products Development</li> <li>14. Marketing and Customer Service</li> <li>15. Responsible Sourcing</li> </ol>	<ul style="list-style-type: none"> <li>• <b>Level 5: Best Practice</b> – Demonstrating current global best practices in DEI; exemplary</li> <li>• <b>Level 4: Progressive</b> – Implementing DEI systematically and showing improved results and outcomes beyond what is required or expected</li> <li>• <b>Level 3: Proactive</b> – Clear awareness of the value of DEI; starting to implement DEI systematically. This is what is required and expected of all organizations.</li> <li>• <b>Level 2: Reactive</b> – Compliance-only mindset. Actions are taken primarily to comply with relevant laws and social pressures. Doing the bare minimum.</li> <li>• <b>Level 1: Inactive</b> – No DEI work has begun; diversity, equity, and inclusion are not part of the organizational goals.</li> </ul>

\* Additional information regarding the GDEIB framework can be found in the GDEIB Primer

- **Relationship of GDEIB to CalSTRS:**
  - Guidehouse will utilize the GDEIB benchmarks to (a) assess CalSTRS' current state of DEI practices and (b) provide perspective on a future state of DEI priorities at CalSTRS. Guidehouse reviewed documents provided by CalSTRS to determine the current assessment and will use stakeholder interviews to determine the proposed future state.
  - The “Starter Pack” document included over 500 pages and 40 attachments to onboard Guidehouse. It assisted Guidehouse’s current state assessment and helped Guidehouse to learn more about the various diversity, equity, and inclusion efforts important to the organization. The documents included but were not limited to:
    - Strategic and Business Plans
    - Sustainability and Workforce Plans
    - The Diversity in the Management of Diversity Report
    - Human Resources related material
    - Engagement Survey Results
    - Additional Investments branch information
- **Timeframe:**
  - **Phase 1: Assessment** - began March 2023
    - The primary goal of Phase 1: Assessment is to conduct an organizational assessment of the current DEI efforts as measured by the GDEIB benchmark model.
    - The assessment is in progress using the Global DEI Benchmarks (GDEIB).
    - Guidehouse will gain stakeholder input in July 2023 by conducting interviews and focus groups.
    - The Assessment Report will be categorized into four groups containing 15 categories. Additionally, the report will identify accomplishments, gaps, and progress toward best practices in creating the desired state of DEI at CalSTRS. The report is expected to be completed by August 2023.
    - Guidehouse will present the Assessment Report to CalSTRS in September 2023. The report will be finalized collaboratively in September 2023.
  - **Phase 2: Design and Evolve** - will begin October 2023 and run through approximately April 2024.
  - **Phase 3: Implementation** - will begin in approximately April 2024 and run through December 2024.

### Early Impressions/Insights

- Guidehouse has not identified any risks according to the risk assessment provided by CalSTRS. All activities are on target.
- Guidehouse is fostering strong communication and collaboration with CalSTRS.
- All preliminary assessments for the 15 categories average at a Level 3: Proactive. The preliminary assessment rating for each category is available in the table below.

Category	Level Rating
1: Vision, Strategy, and Business Impact	Level 3: Proactive
2: Leadership and Accountability	Level 3: Proactive
3: DEI Structure and Implementation	Level 3: Proactive
4: Recruitment	Level 4: Progressive
5: Advancement and Retention	Level 3: Proactive
6: Job Design, Classification, and Compensation	Level 4: Progressive
7: Work-life Integration, Flexibility, and Benefits	Level 3: Proactive
8: Assessment, Measurement, and Research	Level 3: Proactive
9: DEI Communications	Level 3: Proactive
10: DEI Learning and Development	Level 3: Proactive
11: Connecting DEI and Sustainability	Level 5: Best Practice
12: Community, Government Relations, and Philanthropy	Level 3: Proactive
13: Services and Products Development	Level 3: Proactive
14: Marketing and Customer Service	Level 2: Reactive
15: Responsible Sourcing	Level 3: Proactive

*\* The preliminary assessment for Category 14 was rated at a Level 2: Reactive based on the information provided on external marketing products and services for diverse customers.*

### Timeline for Next Steps

#### Status of Phase One: Assessment, Deliverables, and Milestones (March-September 30, 2023)

Deliverable: Project Communication Protocols	
Milestones	Status
DEI Consulting Engagement Workplan	Completed
Integrated Master Schedule	
Status Template: Weekly Report	
Status Template: Monthly Report	
Schedule: Weekly Status Meetings	
Schedule: Monthly Executive Sponsor Briefings	
Deliverable: Current State Organizational Assessment based on GDEIB Model	
Milestones	Status
<b>GDEIB Primer:</b> Develop overview for CalSTRS Stakeholders	Completed
<b>Secondary Data Review:</b> Review CalSTRS Starter Pack for preliminary Global Diversity, Equity, and Inclusion (GDEIB) Assessment (15 sections with multiple attachments)	Completed

<b>Benchmark Workbooks:</b> Develop workbook for each GDEIB category to document data review results	Completed
<b>GDEIB Category Preliminary Assessments:</b> Use CalSTRS secondary data review to develop preliminary assessments and engage in client dialogue to address gaps, and finalize	On Target:  <i>All preliminary assessments for the 15 categories have been delivered to CalSTRS.</i>
<b>Stakeholder Input:</b> Develop stakeholder input plan, stakeholder guide, stakeholder questions, conduct interviews to determine perception of future state	On Target:  <i>Tentative Date: July 2023</i>  <i>Preliminary Focus: Level 5, "Best Practice"</i>
<b>GDEIB Summary Assessment:</b> Summarize 15 benchmark assessments	On Target Date Due: 8/1/2023
<b>Recommendations:</b> Develop recommendations based upon preliminary assessments	On Target Due Date – 9/6/23
<b>Assessment Report:</b> The Assessment of DEI Related efforts will be included.	On Target Date Due: 9/20/23
<b>Deliverable: Conduct Assessment of Related DEI Efforts</b>	
<b>Workforce Demographics:</b> Review diversity workplace statistics and trends. Compare/Contrast to CalSTRS	On Target: Date Due: 8/30
<b>Employee Experience:</b> Review CalSTRS employee surveys to gain insights on employee experiences with CalSTRS practices	On Target: Date Due: 8/30

**Overview of CalSTRS DEI advocacy efforts.**

- Guidehouse is currently researching best practices in this area. California State agencies, additional organizations relative to the industry that CalSTRS serves, and other similar government organizations utilizing GDEIB will be considered in researching while we work towards delivering the final assessment.