



Understanding Global Diversity and Inclusion

Preliminary Observations

March 2021

**THE
BARTHWELL
GROUP**

EXCELLENCE. COMMITMENT. RESULTS-DRIVEN.

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Overview

Globalization is becoming increasingly important for U.S. corporations, as greater amounts of their revenues are derived from overseas operations. Between 2004 and 2014, S&P 500 sales from foreign countries increased from 43% to nearly 48% of total sales¹; over the same time period, 47 corporations relocated their headquarters overseas.² In 2016, Wells Fargo Investment Banking forecasted that U.S. companies would continue to rely on international markets for growth, because “while some U.S. companies may be reevaluating certain factors of their international strategy – such as timing and specific markets – they are not retreating from pursuing global business opportunities as a core part of their business strategy.”³ In 2018, the percentage of S&P 500 sales from foreign countries decreased to 42.90%, down from 43.62% in 2017, and 43.16% in 2016.⁴ While the overall rate of sales from foreign countries has slightly decreased, Asian and European sales continue to remain a significant source of revenue.⁵

Across sectors – whether among manufacturers seeking cheap labor, or retailers and professional service firms wishing to expand their markets – U.S. businesses are heavily dependent on global markets. Rick Newman, Chief Business Correspondent for *U.S. News and World Report*, states, “Foreign exposure allows U.S.-based companies to capitalize on rapid growth in emerging markets like China, India, and Latin America, and earn much stronger profits than if they were totally dependent on the struggling U.S. economy.”⁶ The increasingly global focus of corporations is reflected in the S&P 500; in 2018, 42.9% of revenue among all S&P 500 companies came from international sales.⁷ Additionally, 87% of U.S. companies, regardless of the business sector, agreed that international expansion was needed for long-term growth, and projected that 69% of the growth opportunities were concentrated in emerging markets.⁸ Furthermore, McKinsey and Co. projected in a 2018 report that by 2030, emerging economies are expected to represent 62% of total consumption growth—the equivalent of \$15.5 trillion, with 22% of that amount coming from China alone.⁹ These factors indicate a continued and heightened importance of international expansion for businesses focused on long-term growth.

Increasingly, goods and services previously manufactured and produced in the United States are now being imported. The balance of trade began to shift in the mid to late 1990s in heavy manufacturing and continued to expand in other durable goods and

¹ <https://www.spglobal.com/spdji/en/documents/research/research-sp-500-2014-global-sales.pdf>

² https://waysandmeans.house.gov/sites/democrats.waysandmeans.house.gov/files/A_Spike_in_Corporate_Inversions.pdf

³ http://www.wellsfargo.com/about/press/2016/international-business-indicator_0425/

⁴ <https://us.spindices.com/indexology/djia-and-sp-500/sp-500-global-sales>

⁵ <https://www.prnewswire.com/news-releases/sp-500-foreign-sales-for-2017-total-43-6-300698039.html>

⁶ <http://http://money.usnews.com/money/blogs/flowchart/2011/06/30/why-us-companies-arent-so-american-anymore>

⁷ <https://us.spindices.com/indexology/djia-and-sp-500/sp-500-global-sales>

⁸ http://www.wellsfargo.com/about/press/2016/international-business-indicator_0425/

⁹ <https://www.mckinsey.com/featured-insights/innovation-and-growth/outperformers-high-growth-emerging-economies-and-the-companies-that-propel-them#>

services. During the 2008 recession, the United States experienced a significant trade deficit followed by slow improvement in the following years.¹⁰ As communication and technology improved, there was a rapid acceleration to move manufacturing, service centers, and technology off shore.¹¹ For instance, between 2008 and 2017, the import of manufactured goods to the U.S. as a percent of domestic manufacturing gross output increased from 9.15% to 12.44%.¹² This trend is likely to continue as many parts of Asia and India experience rapid economic growth. Moreover, in 2020, China, a preferred destination for research and development¹³, was the United States' top trade partner for goods and services.¹⁴ According to an August 2016 *Forbes* Magazine article, "the combination of a bigger Chinese export market and the further internationalization of the yuan will put China on track to surpass the U.S. as the world's largest economy sometime in the next 10-15 years."¹⁵ While phase one of a trade agreement between the U.S. and China was signed in January 2020, tensions around the origin of COVID-19 turned relations between the U.S. and China into a point of contention. As of December 2020, trade relations between the U.S. and China remained weak, as China responded to tariffs and sanctions from the U.S.¹⁶

U.S. Businesses are heavily dependent on global markets
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As organizations expand their operations abroad, they must manage increasingly complex workforces...

Although globalization leads to growth, it also presents challenges. As organizations expand their operations abroad, they must manage increasingly complex workforces comprised of multiple cultures and ethnicities with demographic tensions which may vary greatly from those found in the United States. Due to the rapidly increasing adoption of new technologies in the workplace designed to facilitate globalization, workforce management has also become increasingly complex.¹⁷ Leaders must be able to motivate and engage multicultural teams both overseas and domestically, especially because globalization and multicultural domestic markets are both increasingly important to revenue growth of U.S. corporations.

¹⁰ <http://www.tradingeconomics.com/united-states/balance-of-trade>

¹¹ http://economics.about.com/od/foreigntrade/a/trade_deficit_h.htm

¹² <https://www.forbes.com/sites/stevebanker/2018/07/11/u-s-manufacturers-are-not-reshoring/#f45db9460ca3>

¹³ <http://www.sciencemag.org/careers/features/2015/12/research-boom-chinas-municipalities>

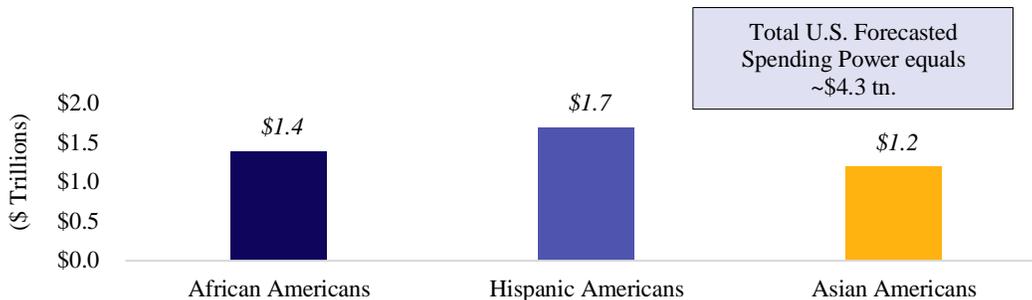
¹⁴ <https://www.census.gov/foreign-trade/statistics/highlights/toppartners.html>

¹⁵ <http://www.forbes.com/sites/greatspeculations/2016/08/24/three-ways-to-profit-from-chinas-rising-global-economic-influence/#2a45a3cb3c84>

¹⁶ <https://www.cnbc.com/2020/12/10/no-reset-in-sight-for-us-china-relations-natixis-economist-says.html>

¹⁷ <https://hbr.org/2016/04/the-paradox-of-workplace-productivity>

U.S. Forecasted Spending Power (2020)



In the U.S, forecasted spending power in 2020 for Asian Americans, African Americans, and Hispanic Americans was, \$1.2 trillion,¹⁸ \$1.4 trillion¹⁹, and \$1.7 trillion, respectively.²⁰ The sustained growth of the U.S. economy in 2018 culminated in \$14.8 trillion of national buying power, with the biggest percentage gains occurring in minority markets.²¹ Research has shown that having diverse workforces, management, and leadership and an inclusive environment are critical in appealing to multicultural markets and ensuring greater innovation.²² Therefore, a key question is: how can organizations develop successful strategies to ensure global diversity and inclusion?

The Collaborations

In order to shed light on this complex question, The Barthwell Group implemented a two-phased collaborative research analysis. After these research collaborations concluded, the data in this report were updated to reflect the latest publicly available information. During Phase I, which began in 2016, The Barthwell Group, a Certified Woman-Owned, Minority Business Enterprise strategic management consulting firm, entered into a collaboration with the School of Global Inclusion and Social Development at the University of Massachusetts Boston (the “Collaborative Global D&I Study”). Founded in 2005, The Barthwell Group has advised several *Fortune 500* corporations, not-for-profit institutions, and the military on complex diversity and inclusion challenges.²³ Founded in 2013, the School of Global Inclusion and Social Development focuses on social justice and economic development from an international perspective, with an

¹⁸ <https://www.forbes.com/sites/rosaescandon/2020/05/22/asian-american-consumer-market-is-now-12-trillion-and-what-that-means-for-digital-brands/?sh=45b553343620>

¹⁹ <http://atlantablackstar.com/2016/02/04/2016-nielsen-report-black-buying-power-reached-tipping-point-will-black-america-leverage-create-wealth/>

²⁰ <https://www.catalyst.org/research/buying-power/>

²¹ <https://www.newswise.com/articles/minority-markets-have-3-9-trillion-buying-power>

²² Chip maker Intel’s Global Diversity and Inclusion Director, Rosalind Hudnell explains innovation comes from having a diverse workforce: “We have a vast amount of diversity [within the company] that comes into work every day to build technology that plays out around the world. You can’t be successful on a global stage without it.”

http://images.forbes.com/forbesinsights/StudyPDFs/Innovation_Through_Diversity.pdf

²³ Consult The Barthwell Group’s website, www.barthwellgroup.com, for specific highlighted clients such as: Lockheed Martin, 3M, Booz Allen, Indiana University, Iowa State University, and the U.S. Marine Corps.

emphasis on groups of people who are excluded from communities in the U.S. and abroad, due to gender, ethnicity, age, economic status, and other conditions.²⁴ During the 2015-2016 academic year, four graduate students (Jessica Allen, Elena Korepanova, Kevin McCormack, and Michele Tolson) studying Cultural Competency: Impacts on Innovation and Model Development under Dr. Sindiso Mnisi Weeks, Assistant Professor, Public Policy of Excluded Populations²⁵, embarked on a research project with oversight from Dr. Akosua Barthwell Evans²⁶, Founder and CEO of the Barthwell Group, and Karen Delk²⁷, an Associate at The Barthwell Group. The overall purpose of the collaborative study was to develop preliminary observations about the following: (i) how diversity and inclusion are defined globally, (ii) strategies and tools used to build inclusive environments, and (iii) methodologies used to align diversity and inclusion strategies domestically and globally.

In Phase II, following this collaboration, Walter K. Evans, Chief Operating Officer at The Barthwell Group, Neha Shah, Managing Consultant at The Barthwell Group, former Analysts at The Barthwell Group, Ben Palmer and Lucretia Hicks, and students from Yale University who worked with The Barthwell Group as summer interns and as research analysts, Kiran Damodaran and James Dunn, continued to independently collect data and refine the analysis. The Barthwell Group later partnered with senior executives at BP and AT&T in order to gain more detailed case studies regarding the state of global D&I, and conducted extensive additional research. Ray Dempsey, former Chief Diversity Officer at BP, and Corey Anthony, SVP – Chief Diversity and Development Officer at AT&T, were instrumental in this phase of our work. As part of this second collaboration, The Barthwell Group conducted in-depth interviews with regional leaders and employees dedicated to D&I across four continents. Specifically, interviews were conducted with AT&T representatives in the United States, Brazil, and India, and with BP representatives in the U.S., South Africa, and China. Information regarding specific

²⁴ <https://globalinclusion.umb.edu/about/mission>

²⁵ Dr. Sindiso Mnisi Weeks, LLB D. Phil, Assistant Professor, Public Policy of Excluded Populations, School for Global Inclusion and Social Development. Dr. Weeks has published in academic and popular media on customary law, women's rights, cultural rights, governance, participatory democracy, dispute management, and the South African constitution. As a Rhodes Scholar at the University of Oxford, she researched the tensions between living customary law(s) and South African state law. https://www.umb.edu/academics/sgisd/faculty_staff/sindiso_mnisi_weeks

²⁶ Dr. Akosua Barthwell Evans, Founder and Chief Executive Officer of The Barthwell Group is a graduate of Columbia University (Ph.D., M. Phil.), Yale University (J.D.), and Barnard College (B.A.). She has more than 30 years in legal, banking and management consulting experience working with leading *Fortune 500* organizations across a variety of industries. Dr. Evans was Co-Marshall of her class at Yale Law School and won the Edward D. Robbins Memorial Prize for her writing at the Yale Law School. She is a frequent speaker on diversity issues throughout the United States. She has served on more than 16 boards of large not-for-profits throughout the United States.

²⁷ Karen Delk, Professional Certified Coach (Evidence Based Coaching) Fielding Graduate University, graduate of The London School of Economics and Political Science (M.Sc. in Industrial Relations and Human Resource Management) and Mount Holyoke College (B.A. in Politics) has more than 25 years in *Fortune 50* organizations in automotive, consumer products and financial services. Ms. Delk holds certifications in International Coach Federation as Professional Certified Coach, Appreciative Inquiry, Authenticity, Caliper Profile, FIRO-B, Hogan Instruments, Meyers-Briggs Type Indicator, Question Thinking, and Strength Finder.

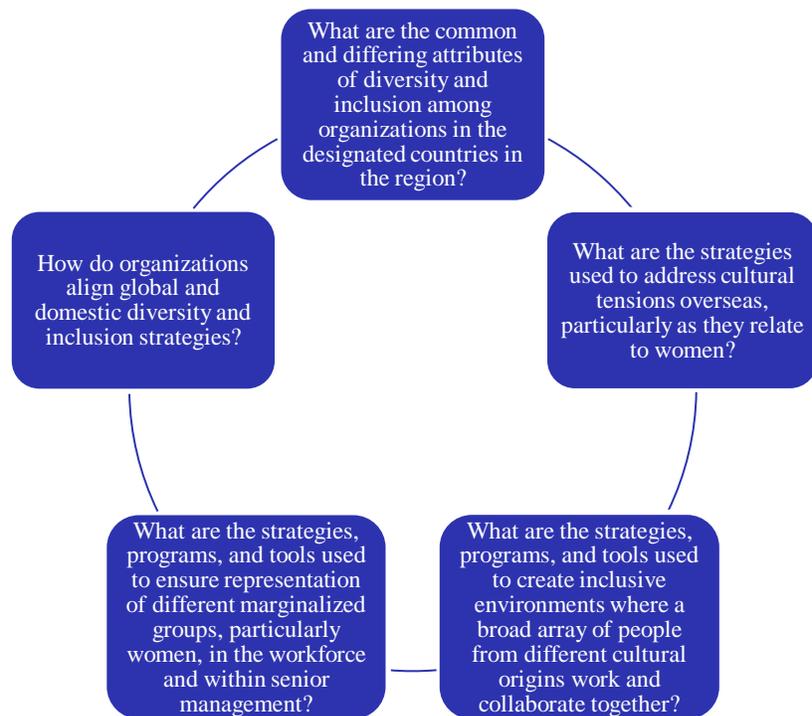
practices in these interviews was combined with in-depth research regarding the current state of diversity and inclusion in the workforce in eight countries around the world – the United States, Canada, Brazil, Chile, Nigeria, South Africa, China, and India – in order to gain comprehensive insights regarding optimal approaches for companies to improve their global D&I strategies.

“Diversity” was defined as representation of members of groups (e.g., ethnic, racial, gender, etc.) which have experienced marginalization or discriminatory treatment within the broader society as a result of a physical characteristics, personal identity attributes, or socio-economic status. Because marginalized groups vary in different societies, the goals of diverse representation will vary based on the context. “Inclusion” was defined as an environment in which all individuals have an equitable opportunity to be valued and respected, and to realize their potential (regardless of differences).

Research was conducted within a limited context. During Phase I, data were collected using publicly available information. Research focused on answering the five questions in Figure.

These questions were designed to determine whether there are commonalities among methodologies used by organizations worldwide as they strive to create environments in which teams, regardless of cultural and other differences, are respected and motivated to achieve optimal productivity. We also sought to discover the key demographic groups which as a result of their roles in the larger society should be represented in the workforce (but which may have experienced marginalization). We analyzed the key factors contributing to the marginalization of certain demographic groups in the broader

Figure 1: Principal Research Questions



society, and the strategies and tools which organizations use to encourage the cultural competency necessary to ensure equitable professional development and integration of these groups in the workforce, and how organizations align the implementation of diversity and inclusion globally (given the differences in cultures and the roles of various demographic groups). The ultimate goal was to discover whether as a result of preliminary research, observations might be developed which would assist organizations as they seek to establish inclusive environments globally.

With the help of the students and members of The Barthwell Group, we analyzed 20 organizations (11 corporations and nine not-for-profits) in four regions as illustrated in Figure 2.

During Phase II, we narrowed the scope of our analysis to focus on four countries: China, India, Brazil, and South Africa (the “Target Areas”). We also began collaborating with senior executives focusing on Diversity and Inclusion at AT&T and BP. Through their colleagues in the Target Areas, we were able to obtain pragmatic insights regarding how global diversity and inclusion are actually implemented. These collaborations were invaluable because they enabled us to develop pragmatic observations on how to successfully implement diversity and inclusion in various geographic regions in the world.²⁸

Figure 2: Map of Countries and Organizations Selected for Global D&I Research



²⁸ We collaborated primarily with Corey Anthony, Senior Vice President – Chief Diversity and Development Officer at AT&T, and with Ray Dempsey, former Chief Diversity Officer at BP. Both arranged for us to interview their colleagues in the Target Areas.

Methodology and Analytical Framework

During Phase I, students applied a cultural competency lens as they conducted their research. Based on their readings and classroom discussions, students defined cultural competency as “a set of congruent behaviors, attitudes and policies that join together in a systemic ethos that professionals adopt to work effectively in cross-cultural situations.”²⁹ When applied in the workplace, cultural competency is the ability to understand, appreciate, and interact with persons from cultures and/or belief systems other than one's own. Cultural competency often results when managers have the tools and the systemic skillsets to analyze the impact of three sets of factors (the “Cultural Competency Factors”) on key demographic groups within the workforce as noted in Figure 3 and to develop effective solutions.

Figure 3: Cultural Competency Factors



As individuals and their leaders engage in objective analyses and develop tools and strategies to ensure that all individuals are treated equitably (regardless of cultural group), they attain greater cultural competency. In analyzing global diversity and inclusion, students sought to determine the impact of the Cultural Competency Factors within their focus organizations and regions by answering the questions in Figure 4.

Figure 4: Research Questions Aligned by Cultural Competency Factor

Discrimination and Fairness	Access and Legitimacy	Learning and Effectiveness
<ul style="list-style-type: none"> •What are the organizational mechanisms (policies, programs and activities) that address forms of discrimination in the global workplace that are similar or different to those used in the workplace in the United States? 	<ul style="list-style-type: none"> •What are the strategies, programs, tools used to ensure that different demographic groups, particularly women, have access to senior management opportunities in the workforce? •What are the organizational pillars that support equal access for populations who are underrepresented in the global workplace? 	<ul style="list-style-type: none"> •How do organizations align and support individuals to increase their skills and knowledge in cultural competence in the global workplace? •How can we determine if strategies, policies and programs are aligned with the global organizational message?

²⁹ <https://nccc.georgetown.edu/curricula/culturalcompetence.html>

As students conducted the initial research for the Collaborative Global D&I Study, they analyzed the intersections between cultural competency and organizational diversity and inclusion strategy development using a multi-step process in order to develop preliminary observations which might inform organizations as they develop approaches for effective global diversity and inclusion strategies.

- Geographic demographic profiles: The students first prepared profiles in order to understand the key demographic groups, cross-cultural stratification, and tensions within the countries where they were analyzing D&I strategies.
- Organizational cultural competency: After identifying the key demographic groups, cultural stratification, and economic and social tensions, students analyzed the organizations they were studying to understand their general attributes, their global D&I mission, strategy, and infrastructure, and to assess the efficacy of the D&I strategies in creating greater cultural competency (by seeking to determine their impact on the Cultural Competency Factors in Figure 3).
- Cultural competency commonalities: Students identified key strategies, tools, and infrastructures which were used to ensure greater inclusion in multicultural workplaces.
- Cultural competency challenges: Students identified challenges faced by specific marginalized groups which were particular to certain geographic areas.
- Observation development: Students identified key lessons learned that could influence the development of global D&I strategies applicable to their specific analytical regions.

To determine how global D&I is implemented in different regions, we conducted a comparative analysis to determine the specific tools and strategies used to address the Cultural Competency Factors using the guidelines listed below.

Discrimination and Fairness involves organizational tools and strategies which demonstrate an understanding of, and respect for, the importance of culture in practice, policy, research and work. These tools and strategies enable more effective appeal and recruitment of the society's underrepresented groups.

Access and Legitimacy involves the development of tools and strategies which enable team members recruited from marginalized populations to have access and exposure to professional development, growth opportunities, mentorship and sponsorship. It also involves developing the tools and strategies which create accountability for the full integration of members of underrepresented populations into the organization.

Learning and Effectiveness involves the development of training programs and leadership guidelines to improve the cultural competence for employees, including top management, middle management, immediate supervisors, direct and administrative staff.

In Phase II, The Barthwell Group used initial insights from Phase I as a basis to conduct additional research and interviews with D&I representatives from large corporations with

well-regarded D&I practices in multiple nations. The goals of this research were to identify exemplars of D&I practices internationally, to explore the complex relationships between global and local D&I policy, and to identify trends in the ways in which international corporations interact with regional laws, policies, and cultural attitudes regarding D&I. First, in order to gain more detailed background knowledge regarding the state of D&I internationally, The Barthwell Group selected eight countries in four continents – Canada, the United States, Brazil, Chile, Nigeria, South Africa, China, and India – and conducted in-depth research based on publicly available data to determine the key factors impacting diversity and inclusion in these areas. The continents were selected first in order to ensure that the sample of countries selected represented as wide of a range of cultural values as possible. Within each continent, two countries were selected to allow for comparisons of attitudes toward D&I within a given continental region. Finally, individual countries were selected based on the size of international industry present, as well as their alignment with The Barthwell Group’s business contacts who were more likely to agree to participate in the next area of research.

Having selected the countries, The Barthwell Group developed country profiles for each one, which contain information about which groups have historically faced marginalization and discrimination, as well as more general information about the demographic groupings in each country, local laws surrounding D&I, and cultural background information that might impact stances on D&I. The Barthwell Group also formed collaborative partnerships with AT&T and BP, working primarily with Ray Dempsey, former Chief Diversity Officer at BP, and Corey Anthony, Senior Vice President – Chief Diversity and Development Officer at AT&T, in order to learn more about the two companies’ D&I policies. Both companies were selected due to high activity in at least two countries selected in the previous round of research. Through the collaboration with AT&T, The Barthwell Group interviewed AT&T D&I representatives in AT&T’s Brazil and India locations and spoke with representatives from BP in China and South Africa. Through these interviews, The Barthwell Group learned about the two companies’ global D&I policies, using that information to compare global and local D&I infrastructure. All interview questions were qualitative, and they primarily focused on the specific challenges to D&I in a given country and how regional offices have strategized to address these challenges. Key Observations from both Phases of research immediately follow this section. See Figure 5 for more specifics regarding marginalization in the four countries observed, and feedback from our interviews.

Figure 5: Key Insights on Marginalization and Feedback from Interviews³⁰

Africa	Asia	North America	South America
Marginalization Across Borders			
<ul style="list-style-type: none"> While Nigeria has experienced tremendous economic growth over the past two decades, this growth has been accompanied by a rise in inequality, creating equity gaps for minority groups both socio-economically and culturally. South Africa is one of the most developed and promising nations in Africa, yet it is held back by a long history of apartheid and its resulting inequities. Despite the end of apartheid, large racial and ethnic disparities persist both culturally and professionally. 	<ul style="list-style-type: none"> In China, the Han population is so large that ethnicity and nationality are often conflated by the country's people. As a result, anyone who is not Han is treated differently. In India, marginalization is found within the pervasive caste system that divides Hindus into classes based on the families (and occupational categories into which they are born). 	<ul style="list-style-type: none"> Today, there remain large inequalities between whites and ethnic minorities in the U.S. Marginalized groups, like Blacks, Hispanics, and Native Americans, are affected by prejudice and discrimination, and many racial minorities continue to lag behind their white peers in employment, education, and quality of life. In Canada, marginalized groups consist of indigenous peoples, and black Canadians. Both groups face systemic and blatant racism. 	<ul style="list-style-type: none"> When defining race and ethnicity in Brazil, there tends to be an emphasis on skin color, as opposed to ancestry; black and white are seen as the ends of spectrum. Indigenous groups, located in the Amazon, face some of the harshest discriminatory treatment in Brazil. In Chile, the primary ethnic divide is between indigenous and non-indigenous residents. Indigenous peoples are often a victim of violence and face severe disadvantages in the job market. Chileans of African descent are also marginalized and face systemic inequality in both schooling and job opportunities.
Interview Insights			
<ul style="list-style-type: none"> Since BP is such a large company in South Africa, it has especially influenced BP SA, as it seeks to be a leader in the country in this area. In terms of specific targets for D&I, BP SA works to promote female representation, people of color, LGBT+ populations, and a diversity of tribes, as tribal prejudice remains to some extent. 	<ul style="list-style-type: none"> Given the relative racial homogeneity of the Chinese population, race does not play a major role in BP China's D&I policy. The most significant emphases for BP China's D&I policy are gender, ethnic, and geographic diversity and inclusion. A primary challenge for AT&T India is the recruitment and retention of female employees. Another challenge for AT&T India D&I efforts is the hiring of LGBT+ individuals. Section 377, a law in the Indian Penal Code prohibits homosexual behavior; thus, companies may face legal issues when attempting to target LGBT+ individuals for hiring. 	<ul style="list-style-type: none"> Since much of BP's global policy stems from its U.S. and U.K. philosophies, as much of its top leadership hails from these two regions, the global D&I policy closely mirrors U.S. D&I policy. Given greater overall emphasis on D&I in the U.S. and the Chief Diversity Officer's placement within the U.S., these issues and the overall philosophy are amplified within the country. AT&T hones in on specific aspects of its global policy and develops initiatives, based on their relevance to the United States as a whole, but also tailors D&I policy to specific communities within the country. 	<ul style="list-style-type: none"> Overall, AT&T's D&I policy in Brazil is based primarily on the framework of the company's global policy. However, AT&T in Brazil has moved beyond the global policy by identifying specific challenges to equality in Brazil, and by focusing its D&I efforts on groups such as individuals with disabilities.

Key Observations

Diversity is not a global concept. In some parts of the world, there is no concept of diversity. Within the United States, “diversity” is becoming a better-defined concept, with the core value of increasing representation of persons who, because of their membership in a specific demographic group (or an attribute of their identity), are marginalized in the greater society. In the United States, diversity applies often, though not always, to issues of race and ethnicity; immigration and refugee status; tribal groups; religion and spirituality; sexual orientation; gender identity or expression; socio-economic class; age; geographic origin; veteran status; and mental or physical abilities. However, internationally, populations may consider different demographic factors when defining marginalized groups, and may place different priorities on achieving diversity across different groups. In China, for example, where over 90% of the population is

³⁰ Interviews conducted by The Barthwell Group were primarily with and coordinated by Corey Anthony, Senior Vice President – Chief Diversity and Development Officer at AT&T, and Ray Dempsey, former Chief Diversity Officer at BP during 2018 and 2019.

ethnically Han Chinese, ethnicity is often conflated with nationality and minority ethnic groups such as Mongols and Uighurs face extreme persecution by both the government and private organizations.³¹ Since the majority's ethnic identity is so intertwined with national identity, Chinese businesses may be less likely to see ethnic representation as a core part of diversity in the same way it is seen in, for example, the United States. As a result, companies and other organizations which seek to expand their reach internationally must develop, understand, and adapt to more localized conceptions of diversity. This understanding can help to inform inclusive policies and ensure that marginalized individuals in a given region have equal opportunities for gainful employment.

Diversity demands local definitions. Although marginalized groups are generally near the bottom of the socio-economic ladder in all countries researched, the demographic factors impacting marginalization (typically related to race, ethnicity, gender, geographic origin, or sexual orientation) are not consistent. Therefore, a “one-size fits all” regional diversity strategy is not productive. In both China and India, there is a correlation between societal marginalization and socio-economic status, with the most marginalized groups also being on average the least wealthy in both nations. However, the demographic groups which are marginalized and occupy the lowest socio-economic position in China and India are not uniform (e.g., in China the most marginalized groups are the Mongols, Tibetans, and Uighurs, while in India the Dalits are the “untouchables”).^{32 33} As a result of these cultural differences, people in different regions use different identities as their primary identity; for example, people in India may be more likely to primarily identify as a certain class while people in China may be more likely to identify primarily with a national or ethnic identity. Even within a given country, the factors impacting marginalization can vary greatly. For instance, in Nigeria, since individual religious and ethnic groups are highly concentrated in different geographic regions, individuals from a certain ethnic, religious or other background may face discrimination in one part of the country but be a member of the majority in a different region. Organizations must seek to understand these cultural complexities as they attempt to develop the cultural competencies and the ensuing tools and strategies which might result in greater diversity and inclusion.

Furthermore, although individual perceptions regarding which marginalized groups should be prioritized in order to enhance overall organizational effectiveness will vary, regional and national laws may also factor into D&I policy decisions. Consider, for instance, Brazil, which mandates that all employers dedicate 2-5% of their payrolls to handicapped individuals, who participate in the workforce at a lower rate than the population as a whole.³⁴ To adapt to these standards, AT&T in Brazil has developed

³¹ <https://www.economist.com/news/china/21639555-uighurs-and-tibetans-feel-left-out-chinas-economic-boom-ethnic-discrimination-not>

³² <https://minorityrights.org/wp-content/uploads/old-site-downloads/download-165-China-Minority-Exclusion-Marginalization-and-Rising-Tensions.pdf>

³³ <https://casi.sas.upenn.edu/indias-dalits/indias-dalits>

³⁴ <https://private.disabilityin.org/global/brazil/>

partnerships with multiple schools where AT&T employees teach basic technological skills to disabled students, regardless of whether those students later decide to work at AT&T. Since disabled individuals in Brazil have significantly worse education on average than the general population, this policy has helped AT&T meet national requirements, attract well-trained employees, and ensure a more diverse workspace which benefits all employees.

Generally, regardless of region, women are marginalized both in society and the work force, particularly in leadership and management positions. Although most organizations recognize the importance of striving to achieve greater equity for women, equitable inclusion of women varies greatly both between regions and within the regions themselves.

Inequality between men and women in almost every country in the world has been well-documented. The United Nations Human Development Report published in 2018 the Gender Inequality Index (GII), which measures barriers to gender equity along three axes: reproductive health, empowerment (measured by positions in office and education levels), and socio-economic equality. Among the countries researched for this report, China had the lowest GII (meaning the least amount of inequity) and India the highest.³⁵ Reasons for gender marginalization vary greatly, although in many cases they are justified on the grounds of tradition. In China, gender disparities are tied to the influence of Confucian philosophy and, while pay disparities exist between genders (women earn approximately 36% less than men for completing similar work),³⁶ workforce participation is only slightly lower for women than men, 60.5% compared to 75.3% respectively.³⁷ This contrasts with India and Brazil, where labor force participation is drastically lower for women than men, and women typically work in unskilled, semi-skilled or informal settings. Consequently, they earn less, receive less education, and are often doing more menial or agricultural work.³⁸

Even where women are well-represented in the workforce, they still face poor representation in senior management positions. In 2019, only 9.7% of board directors from publicly traded companies in China were women, compared with 22.6% of board seats among the 3000 largest companies in the United States.^{39 40} This is true even as more women are educated and gain experience, evidenced by the rapid decrease in China's Gender Inequality Index score since 1996.⁴¹ Similar to China, in the United States, women comprise 47 % of the workforce, and women receive more than half of all bachelor's degrees (57.3%), master's degrees (60.1%), and doctorate degrees (53.5%).⁴²

³⁵ <http://hdr.undp.org/en/content/gender-inequality-index-gii>

³⁶ <http://www.catalyst.org/knowledge/women-workforce-china>

³⁷ Ibid.

³⁸ <http://minorityrights.org/minorities/afro-brazilians/>

³⁹ <https://www.catalyst.org/research/women-in-the-workforce-china/>

⁴⁰ <https://www.prnewswire.com/news-releases/women-now-hold-record-22-6-of-russell-3000-board-seats-in-the-us-301132157.html>

⁴¹ <http://hdr.undp.org/en/content/gender-inequality-index-gii>

⁴² <https://www.catalyst.org/research/women-in-the-workforce-united-states/>

While women have progressed in the western countries, there is not a critical mass in management and senior management roles.⁴³

Organizations have excelled by ensuring access to promotion opportunities for women and by creating networking and informative events targeted toward female employees and prospective employees. For instance, AT&T in India participates in an annual conference attended by women technologists and experts from around the country, The Grace Hopper Celebration India, to discuss technology, network, and identify strategies to overcome challenges faced by women working in India.⁴⁴ Events such as these ensure that women meet leaders in their fields, and create opportunities for independent growth that will positively impact careers for women working in India.

Often, the harshest marginalization is directed towards LGBT individuals, and this marginalization is systematically upheld through both legal discrimination and social marginalization. South Africa, for example, has developed vastly improved legislative support for LGBT individuals following the end of apartheid. In 1996, South Africa’s new constitution outlawed discrimination based on sexual orientation, making it the first in the world to do so.⁴⁵ Additionally, South Africa has passed legislation barring workplace and educational discrimination on the basis of sexual orientation.⁴⁶ It legalized same-sex marriage with the Civil Union Bill of 2006, making it the first country in Africa to do so.⁴⁷ This law also gave married homosexual couples the right to receive alimony, adopt children, and make decisions on each other’s behalf, granting them legal parity with heterosexual couples.⁴⁸ Thus, in terms of legal provisions, South Africa has been a regional leader on LGBT treatment and support. However, the LGBT community still faces a great deal of discrimination, as the country’s culture lags behind governmental action. A 2016 social attitudes survey found that 72% of respondents felt that same-sex sexual activity is “morally wrong,” and only half of South Africans believed that gay people should have the same human rights as other citizens.⁴⁹ LGBT individuals—particularly lesbians and transgender men—often face prejudice and abuse from law enforcement, employers, educational institutions, and private citizens.⁵⁰ Violence against LGBT individuals is a key problem. For instance, in Cape Town, the Human Rights Council of South Africa reports that every week there are up to 10 cases of “corrective rape”, a phenomenon where men rape lesbian women with the belief that it will somehow “correct” their sexuality.⁵¹ The disparity between legal victories and social progress indicate that organizations wishing to support LGBT rights must do more than

⁴³ <http://www.catalyst.org/knowledge/statistical-overview-women-workforce>

⁴⁴ <https://ghcindia.anitab.org/>

⁴⁵ <https://outrightinternational.org/content/south-africa-new-constitution-protects-gays-and-lesbians>

⁴⁶ <http://www.sahistory.org.za/article/history-lgbt-legislation>

⁴⁷ <https://www.brandsouthafrica.com/governance/services/rights/same-sex-marriage>

⁴⁸ <http://www.sahistory.org.za/article/history-lgbt-legislation>

⁴⁹ http://theotherfoundation.org/wp-content/uploads/2016/09/ProgPrudes_Report_d5.pdf

⁵⁰ <https://www.hrw.org/news/2011/12/05/south-africa-lgbt-rights-name-only>

⁵¹ <https://wagingnonviolence.org/feature/south-africas-brave-struggle-against-lesbian-hate-crimes/>

operate within legal boundaries regarding discrimination in a given region. Rather, companies must create an accepting and open-minded internal culture which allows for individual expression and discourages passing judgement on others.

Race is often a factor in marginalization, but not uniformly. It is most likely to be a factor particularly where slavery or legalized racial discrimination has existed.

Brazil, for instance, continues to grapple with its history as a large importer of slaves from Africa during the slave trade and as the last nation in the Americas to abolish slavery in 1888.⁵² Empirically, white Brazilians tend to be much better off than other groups. In 2010, whites earned roughly twice as much income as black and mixed-race Brazilians, and more than three times as much income as indigenous peoples. Whites also lived 6.1 years longer than non-whites, on average, in 2008.⁵³ Despite having the largest black population (counting mixed race individuals) outside of Africa, Brazil had only white men in its 2015 presidential cabinet under President Dilma Rousseff, with the exception of the head of the Special Secretariat for the Promotion of Racial Equality.⁵⁴ Furthermore, indigenous groups, located primarily in the Amazon, face some of the harshest discriminatory treatment in Brazil, as their lands are subject to encroachment by land grabbers, loggers, and miners. The rate of Amazon deforestation increased by 29% between 2015 and 2016.⁵⁵ Although the Brazilian constitution guarantees indigenous populations permanent rights to their traditional lands, it also requires that these lands be recognized and delimited by the state before full legal protection is granted.⁵⁶ The government recognizes roughly 690 territories, covering about 13% of the country's land mass, with 98.5% of the territories located in the rainforest regions along the Amazon.⁵⁷ Despite legal protections for these spaces, there are still frequent disputes over land, which often turn violent,⁵⁸ and there were 138 documented murders of indigenous peoples in 2014.⁵⁹ Racial discrimination depends heavily upon historical context in a given region. For instance, the historical legacy of the slave trade creates different challenges to racial inclusion than the historic repression and marginalization of indigenous peoples.

Ethnicity may cause some groups to be marginalized. This is particularly true when laws or cultural traditions restrict rights based on ethnicity. For example, Nigeria, which has more than 250 ethnic groups and no single majority ethnic group, has experienced considerable tension on the basis of ethnicity, and some ethnic groups have been marginalized both by law and by social policy.⁶⁰ In a country where, according to a 2005 study, 48.2% of individuals labelled themselves primarily with an ethnic identity compared with only 28.4% who used a class identity, issues of ethnicity feature

⁵² <http://www.slaverysite.com/Body/facts%20and%20figures.html>

⁵³ <http://sites.middlebury.edu/ehrgc/files/2015/04/Bucciferro.pdf>

⁵⁴ https://www.nytimes.com/2015/03/24/opinion/vanessa-barbara-in-denial-over-racism-in-brazil.html?_r=0

⁵⁵ <http://www.dw.com/en/amazon-deforestation-ticks-tragically-up/a-36597538>

⁵⁶ <https://pib.socioambiental.org/en/c/terras-indigenas/introducao/o-que-sao-terras-indigenas>

⁵⁷ <http://www.survivalinternational.org/tribes/brazilian>

⁵⁸ <http://news.nationalgeographic.com/2016/01/160120-brazil-illegal-logging-indigenous-people-Amazon-Basin-Awa-ibama/>

⁵⁹ <http://www.cimi.org.br/File/Report%20Violence.pdf>

⁶⁰ <https://www.accord.org.za/ajcr-issues/ethnic-religious-crises-nigeria/>

prominently in state affairs.⁶¹ In particular, northern Nigeria is home to a high concentration of the largely Muslim Hausa-Fulani ethnic group, while southern Nigeria has a higher concentration of Igbo peoples, who are primarily Christian. As a result, increasing migrations of Muslims to the South or Christians to the North, connected with ethnic and tribal identities, have resulted in several state governments advocating for programs to control the population of external ethnic groups.⁶² In contrast to Nigeria, where marginalization is highly localized even within the country due to the absence of one majority group, minority ethnic groups in other countries might face persecution by one majority group. In Chile, for instance, the indigenous Mapuche people, who comprise approximately 9% of the nation's population, often face physical violence, including a highly publicized murder in 2008,⁶³ as well as discrimination in terms of employment and education opportunity. The World Bank found that, in 2002, the average adult worker in the indigenous population had completed 7.3 years of education, compared to 9.5 years for all non-indigenous working adults.⁶⁴ The Unrepresented Nations and Peoples Organization found that less than 3% of the entire Mapuche population receives an education past high school.⁶⁵ Similarly, indigenous primary school children score 0.3 – 0.5 standard deviations below their non-indigenous counterparts on standardized Spanish and mathematics tests.⁶⁶ In a 2018 study between indigenous and non-indigenous Chilean eighth and tenth grade students, findings showed that being indigenous is associated with a lower math test score of 0.02 – 0.05 standard deviations, and a lower language score of a 0.02 standard deviation, when compared to non-indigenous students.⁶⁷

Most organizations and corporations profess valuing an inclusive environment where all individuals are valued and can optimize their talent. However, effective implementation policies require a thorough understanding of the local legal infrastructure and culture which may impact the ability to implement successful diversity recruitment strategies. Regional and local input is critical to creating relevant diversity and inclusion global strategies. The societal status of the same demographic group may vary greatly, and not only between regions. Contrastingly, South Africa became the first country in the world to legally eliminate discrimination based on sexual orientation with its new constitution in 1996, as previously discussed.⁶⁸ In 1998, laws preventing employment discrimination based on sexual orientation became codified, and laws permitting same sex marriage were passed in 2006. In spite of these laws, South

⁶¹ Ibid.

⁶² Ibid.

⁶³ <https://www.worldcrunch.com/culture-society/indigenous-of-chile-why-discrimination-against-mapuches-still-runs-so-deep/c3s10678>

⁶⁴ <https://core.ac.uk/download/pdf/6542944.pdf>

⁶⁵ <http://unpo.org/article/16270>

⁶⁶ <http://academics.wellesley.edu/Economics/mcewan/PDF/canschools.pdf>

⁶⁷ https://www.ciir.cl/ciir_2019/wp-content/uploads/2018/08/Webb-Educational-achievement-of-indigenous-students-in-Chile-school-co+mposition-and-peer-effect.pdf

⁶⁸ <http://www.ibtimes.co.uk/south-africa-progressive-lgbt-rights-gays-still-battle-social-reform-1471213>

Africa remains a socially conservative country and despite the progressive legislation, social norms and attitudes are not always accepting of LGBT individuals.⁶⁹

As a result of these discrepancies between legal action and genuine social progress, organizations must take on the burden of understanding complex socio-cultural relationships in each region in which they operate, developing unique policies to uplift employees and create work environments reflective of local demographics. Although all companies and representatives interviewed for this paper espoused beliefs in the importance of diversity and the necessity of a representative work environment, not all organizations have taken the steps to customize their approach to D&I, and that is apparent in the diversity in these offices. In its Chinese operations, for example, BP representatives noted that they utilize the company's general D&I framework and highlight the value of D&I through events and organizations such as Business Resource Groups ("BRGs"), which provide support networks and mentorship opportunities for employees belonging to specific demographic groups.⁷⁰ BP China has achieved progress in gender representation throughout the hierarchy of the company, with more than 30% of senior roles occupied by women. However, they also reported that they do not have specific D&I policies for the region, and that almost all BRG participation is through women's BRGs exclusively.⁷¹ Due to a lack of reported diversity statistics among senior employees for demographics other than gender, it remains difficult to assess the company's progress in enhancing diversity along all demographic axes. This further highlights the need for comprehensive reporting of employee demographic statistics in order to identify and address challenge areas.

⁶⁹ Ibid.

⁷⁰ BP Interview (2019).

⁷¹ BP Interview (2019).

Conclusions

The most important lesson learned, is the necessity to engage members of the local workforce in developing global diversity and inclusion strategies. Because of the great variety in the meaning of “underrepresented groups”, even within the same region, “one size fits all” global diversity and inclusion goals are not likely to be successful.

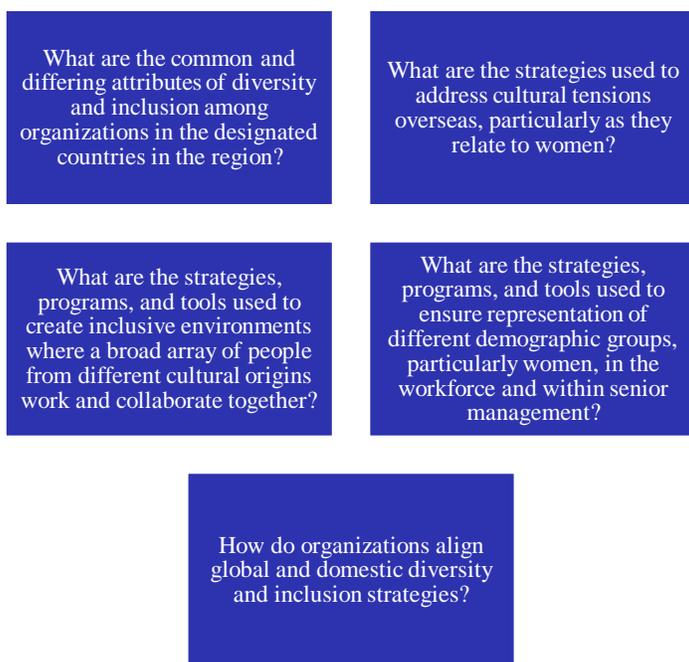
How diversity and inclusion are defined varies widely across organizations, as do the infrastructure and accountability measures for ensuring that diversity and inclusion are achieved. For example, some companies have very general definitions of diversity, while others identify specific areas on which to focus. Furthermore, some international companies maintain strong centralized D&I definitions and strategies, whereas others keep a looser central framework which is adapted based on the needs of specific regions.

Although similar attributes of marginalization may be present in different regions, their impact may still differ. For example, the role of women in China’s workforce varies greatly from the role of women in India’s workforce even though both are in Asia.

While our observations are preliminary, they point to the importance of including local representation in developing global D&I strategies and of ensuring that regional organizations have adequate infrastructure and resources to develop effective cultural competencies. They also point to the importance to greater transparency and effective communication regarding D&I policies, particularly among regional organizations.

It is clear that diversity and inclusion are recognized as important goals for most organizations. The global headquarters of many organizations have infrastructure, defined policies and supportive resources that create diverse and inclusive work environments. The challenge is to find the resources and infrastructure to consistently create this type of environment in the regional operations. Not all regional offices of international firms have utilized diversity and inclusion statements, diversity training, or employee resource groups. Overall, organizations can enhance their message of diversity and inclusion globally by making more specific efforts to understand diversity in a regional context by including local leaders and including ample policies to attract and retain diverse local talent.

Figure 6: Imperative Questions for International Companies



Appendix A: The Barthwell Group Core Contributors

Akosua Barthwell Evans, Ph.D., J.D.

Dr. Akosua Barthwell Evans, the Chief Executive Officer and Founder of The Barthwell Group, has played a major role in overseeing the quality control of numerous D&I engagements for our clients. Among these clients are: McKesson, U.S. Marine Corps, Booz Allen, Lockheed Martin Corporation, and 3M. Prior to launching The Barthwell Group, Dr. Evans was an accomplished banker, lawyer, and management consultant. In addition, throughout her career, Dr. Evans has provided leadership to approximately 16 not-for-profit organizations throughout the United States through her board service. In 2014, she was appointed to the President's Advisory Commission on Educational Excellence for African-Americans, and was a Governance Fellow of the National Association of Corporate Directors for many years. She has participated in conferences regarding advancing diversity and inclusion globally

Dr. Evans has won numerous awards, including: *Distinguished Black Woman Award* (2001), *One of the 25 Most Influential African-American Women in Business* (2002), recognition for her leadership by The Museum of Modern Art in New York (2004), recognition by the Thurgood Marshall College (2004), *Cross Border Award* (2005), and the "Entrepreneur Leadership Award" by the STEM Women of Color conference (2011). She was also featured in *Savoy* magazine in 2012 and in 2014. In 2016, she received an award from the National Association of Woman-Owned Business Owners as one of ten Michigan businesses owned by women for outstanding entrepreneurship, and was appointed to the Yale Alumni Association Task Force on Diversity and Inclusion, and to Yale Women Council. She also presented to the Investment Committee of CalPERS on the importance of corporate board diversity to corporate performance and to the International Corporate Governance Network. She has provided leadership to numerous prestigious not-for-profits throughout the United States through her board service which has included the Yale Law School Fund Board, the Yale Law School Executive Committee, the President's Advisory Council at Barnard College, Co-Founder and Former Chairman, The Friends of Education at The Museum of Modern Art (New York), Honorary Advisory Board, Student Veterans of America, Delegate at Large, Yale Alumni Association Board of Directors, and Board of Trustees, Yale University Black Alumni Association, the Yale Alumni Association Board of Governors, YaleWomen Council, and President, Yale Club of Michigan, among others.

Dr. Evans is a graduate of Barnard College and the Yale Law School, where she was Co-Marshall of her class and won the Edward D. Robbins Memorial Prize for her writing. She holds an M.Phil. and a Ph.D. from Columbia University where her studies focused on Africa and China.

Walter K. Evans

Walter K. Evans is the Chief Operating Officer of The Barthwell Group. Based in Detroit, he oversees the operations of the firm including billing and accounting, finances, human resources, and technology. In addition, Mr. Evans manages the firm's workflow and oversees multiple client engagements. Many of these engagements have been with higher education institutions, and large corporations including with Indiana University,

Iowa State University Wayne State University, Central Michigan University, Lockheed Martin, Wells Fargo, McKesson, Raytheon, and Boeing (often advising on diversity and inclusion).

Mr. Evans has over 14 years of Management Consulting and Finance experience. Immediately prior to joining The Barthwell Group, Mr. Evans was the lead Analyst for HRJ Capital, a billion-dollar venture capital, private equity, and real estate fund-of-funds. There, Mr. Evans assisted the investment committee in deploying the firm's capital and was in charge of monitoring and evaluating all portfolio companies. In addition, Mr. Evans was the sole Analyst and one of two individuals selected to assisting in running the firm's co-investment hedge fund. In 2014, he was featured as one of the 30 top businesspersons in their 30s in Metro Detroit in *Business* magazine. He was also appointed to the Board of Trustees of Detroit's Music Hall. Mr. Evans has traveled to over 39 countries. He was the lead speaker at an event hosted by the prestigious The Diana Award (the foundation authorized to preserve the legacy of Princess Diana) in Birmingham, England, and subsequently spoke at several events which the organization hosted.

Mr. Evans holds two Bachelor's degrees from Stanford University, in Political Science (with distinction) and Symbolic Systems (with honors).

Karen Delk

Karen Delk is an Associate at The Barthwell Group, where she has worked on strategic plan implementation for a foundation as well leadership development for a premier national organization developing diverse suppliers for its corporate membership. Ms. Delk has also helped plan diversity recruiting events for a national financial services firm. She played a substantive role in managing the Phase I research of this White Paper. Ms. Delk comes to The Barthwell Group with more than 25 years in executive human resources ("HR") experience at Prudential Financial where she most recently served as Vice President of Learning at The Learning Organization, at GE Capital where she served as Senior Vice President of HR, and at the Ford Motor Company. Over the course of her career, she has demonstrated expertise in developing and overseeing effective leadership development programs and organizational efficiency strategies. She currently has a long-term coaching relationship with the Yale School of Management.

Ms. Delk graduated from The London School of Economics and Political Science with a Master of Science in Industrial Relations and Human Resource Management and Mount Holyoke College with a Bachelor's degree in Politics. Ms. Delk is also certified by the International Coaching Federation as a Professional Certified Coach.

Neha Shah

Neha Shah is a Managing Consultant at The Barthwell Group. Since joining The Barthwell Group, Ms. Shah has been the lead analyst on a number of strategic planning, facilitation, branding, teambuilding, diversity and inclusion, and assessment

engagements, including TEAM FIRST, a teambuilding and organizational cohesion initiative for Lockheed Martin. Previously, she worked as an Investment Banking Analyst for Jefferies & Company, Inc. in Houston, Texas. As an Investment Banking Analyst, Ms. Shah actively participated in a variety of deals ranging from \$55 million to over \$2 billion. She participated in a wide range of transaction types, including merger and acquisition guidance, equity, equity-linked, and debt financing underwriting, private placements, and other advisory services. Prior to working at Jefferies & Company, Ms. Shah was a Financial Intern for Exchange Capital Management, an investment management firm based in Ann Arbor, Michigan. Ms. Shah is a graduate of the Stephen M. Ross School of Business at the University of Michigan where she obtained a Bachelor's Degree in Business Administration, focusing on Finance and Accounting with a minor in Financial / Actuarial Mathematics with honors.

Ben Palmer

Ben Palmer is a former Analyst at The Barthwell Group. Previously Mr. Palmer was the Co-Founder of One Stop Shovel Shop. Mr. Palmer graduated from the University of Michigan with a B.A. in Economics. Since joining The Barthwell Group, Mr. Palmer has done work on the Wayne State Tactical Action Planning engagement, and with Grand Valley State University, creating an analytical report to present the results of a diverse high school student recruitment assessment. Mr. Palmer has also worked on the curricula development engagement for the Michigan Minority Supplier Development Council, and the enhancing funding sources engagement for the Make Your Date Program at the Wayne State University School of Medicine.

James Dunn

James Dunn is a former Research Analyst at The Barthwell Group. Previously, he worked as a software developer at Brain Power, LLC, a technology startup in Cambridge, Massachusetts, where he programed applications to assist social development of children with autism. Mr. Dunn is also a senior consultant at the Elmseed Enterprise Fund, a nonprofit organization at Yale University focused on encouraging local entrepreneurship in the city of New Haven. Since joining the Barthwell Group, Mr. Dunn has worked as an analyst on a number of projects, including an assessment of the feasibility of implementing Open Educational Resources at Historically Black Colleges and Universities. Mr. Dunn is currently pursuing a Bachelor's Degree in Mathematics and Philosophy at Yale University.

Kiran Damodaran

Kiran Damodaran is a Research Analyst at The Barthwell Group. Previously, he worked as a summer analyst at Incrementum Capital Partners LLC, an independent sponsor and advisory firm specializing in the maritime services and software and services sectors. Mr. Damodaran is also the Vice President, Project Manager for the Yale Undergraduate Consulting Group. Since joining the Barthwell Group, Mr. Damodaran has worked as an analyst on a number of projects, including, Henry Ford Health Systems, Finance Rotation Program and our Global Diversity White Paper.

Mr. Damodaran is currently pursuing Bachelor's Degrees in Economics and English at Yale University.

Greg Inchàustegui

Greg Inchàustegui is an Analyst at The Barthwell Group. Mr. Inchàustegui is a graduate of Columbia University, where he obtained a bachelor's degree, cum laude, in Political Science (emphasis in American Politics and Political Theory) with a concentration in Sociology. At Columbia, Greg served as Secretary, and Vice President of the inaugural Columbia Chapter for the Association of Latino Professionals for America (ALPFA), where he sourced Fortune 500 company recruiters to connect with diverse undergraduate talent on campus. Greg is also an alumnus of Sponsors for Educational Opportunity (SEO) Career (2018-2019), and the Out for Undergraduate Business Program (2017-2019). Before joining The Barthwell Group, Greg worked two summers as an Investment Banking Analyst at Goldman, Sachs & Co, and was a Summer Analyst at Guardian Life. His prior work experiences have largely focused on financial analysis and M&A strategy. Since joining the Barthwell Group, Mr. Inchàustegui has worked as an analyst on a number of engagements, including, Alliance Health's DEI Strategy, Nashville Health Care Council's DEI Plan, and our Global Diversity White Paper.

Appendix B: Bios of Phase One Collaborators

Note that the information given for collaborators in this Appendix includes only information through 2016, during Phase I of this report's development, when these collaborators were involved in research.

University of Massachusetts Boston

Dr. Sindiso Mnisi Weeks:

- Assistant Professor at the School for Global Inclusion and Social Development, University of Massachusetts Boston
- Resident Scholar at the University of New Hampshire School of Law
- Senior Researcher in the Centre for Law and Society at University of Cape Town
- Senior Lecturer in University of Cape Town Department of Private Law 2011-2012
- Former Rhodes Scholar at University of Oxford
- Graduate of DPhil, Socio-Legal Studies, University of Oxford (UK), MSt, Legal Research, University of Oxford (UK), LLB, Law, University of Cape Town (South Africa), BA, Law, Philosophy, and Language, University of Cape Town (South Africa)

Student Researchers from the University of Massachusetts Boston

Jessica Allen:

- Pursuing a Masters in Global Inclusion and Social Development
- Summer Admin Assistant, The Justice Center c/o South Costal Counties Legal Service
- Summer Intern, Massachusetts Legislature
- Graduate Assistant at the Institute for Community Inclusion
- Intern, Secretary's Office for Global Partnerships at U.S. Department of State
- Graduate of Gordon College, B.A. (International Affairs)

Elena Korepanova:

- Pursuing a Ph.D. at the School for Global Inclusion and Social Development, UMass Boston
- Research Assistant, Institute for Community Inclusion
- Assistant Coordinator, Center for International Students and Scholars, Bentley University
- Graduate of Suffolk University (M.Ed.), Lasell College (M. Sc.)
- Graduate of Ural State University (B.A.) Philology with a major in Romance & Germanic

Kevin McCormack:

- Pursuing a Ph.D. in Global Inclusion and Social Development
- Scholar, National Leadership Consortium in Sensory Disabilities Fellowship

- Orientation and Mobility Specialist, Arkansas School for the Blind and Visually Impaired

- University of Houston-Clear Lake (M.S.) Professional Accounting, (B.S.) Professional Accounting

Michele E. Tolson:

- Third year doctoral student in Public Policy, McCormack Graduate School of Policy and Global Studies, UMass Boston
- Research Assistant, Dr. Christian Weller, Department of Public Policy and Public Affairs
- Program Coordinator, Pension Action Center at UMass Boston's Gerontology Institute
- Commonwealth of Massachusetts Recovery and Reinvestment Office
- Massachusetts Public Interest Research Group
- Graduated with distinction in each department at University of Massachusetts Boston (B.A., Ethics, Social & Political Philosophy and Economics double major)

Appendix C: Bios of Phase Two Collaborators

Corey Anthony, SVP – Chief Diversity and Development Officer, AT&T

In his role as Senior Vice President – Chief Diversity and Development Officer, Corey Anthony is responsible for identifying and developing leaders, aligning employees with the company’s vision and priorities, overseeing business unit HR support, and employee engagement. He also leads AT&T’s efforts to leverage its leadership in diversity and inclusion to drive innovation and growth – as well as the company’s EEO and affirmative action policies. He was appointed to his current position in May 2017.

Corey gives back to his community by serving on the boards of directors for Junior Achievement and Dallas CASA. He is a passionate advocate for diversity and inclusion. Corey co-founded a chapter of AT&T’s African American employee resource group, The NETwork – and today serves on the board for Asian Pacific Islanders for Professional and Community Advancement, OASIS and the company’s millennial group, oxyGEN.

Corey earned his Bachelor of Business Administration degree with a double major in finance and accounting from Texas A&M.

Ray Dempsey, Former Chief Diversity Officer, BP

Ray Dempsey, Jr. is the former Chief Diversity Officer for BP America and president of the BP Foundation. He works out of BP’s Houston and Washington, D.C. offices. Dempsey has worked in the energy industry for more than 25 years in a variety of roles in engineering, strategy, finance, and external affairs in the US and abroad.

In his current role, Dempsey leads BP’s diversity and inclusion agenda, linking external networks and partnerships with internal engagement to position BP as an industry leader. Reporting directly to the BP America Chairman and President, Dempsey leads a broad portfolio including national strategic relationships and initiatives, supplier diversity, workforce diversity, and philanthropy.

Dempsey holds a bachelor’s degree in industrial engineering from Kansas State University and a master’s degree in business administration from Northwestern University’s Kellogg Graduate School of Management. He Chairs the Dean’s Advisory Council for the College of Engineering at Kansas State University, where he was also named a 2012 Alumni Fellow.

Appendix D: Background Information about the Collaborators

Brief History of the Corporation

The Barthwell Group was founded in 2005 by Dr. Akosua Barthwell Evans. We are a Certified Woman-Owned Minority Business Enterprise, based in Detroit, with 15 consultants in six states and 16 Subject Matter Experts in the United States and in Africa. We are a strategic management consulting firm which assists clients by offering customized strategies to enhance organizational objectives. Our work focuses on diversity and inclusion, supplier diversity, teambuilding through building greater organizational cohesion with cultural change, strategic planning, assessments, training, brand enhancement, and strategic event implementation.

We advise clients throughout the United States, often on global matters. Our client base includes large, prestigious organizations in the not-for-profit, (e.g., TIAA, the Educational Testing Service, Wayne State University, Indiana University, the Southern Education Foundation, the Ford Foundation, Claremont McKenna College, the Southern University System, Hampton University, Lincoln University) corporate sectors, (e.g., Lockheed Martin Corporation, Booz Allen, ING, 3M, State Street, McKesson, Kaiser Permanente) and the military (e.g., U.S. Marine Corps, and the Air Force Research Laboratory).

We have received numerous awards and recognition for our work, including the Entrepreneur Leadership Award from the Women of Color STEM Conference, recognition for our work with Historically Black Colleges and Universities (from both the Feminist Press and the Thurgood Marshall College Fund). Most recently we received an award among ten leading woman-owned businesses in Michigan from the National Association of Women-Owned Businesses.

Description of Our Core Services

Assessments	Brand Enhancements	Diversity and Inclusion	Community / Branding
Cultural Change Organization	Event Planning	Leadership Training	Organizational Transformation
Strategic Planning	Supplier Diversity	Teambuilding	Training

Visit our website to learn more about us: www.barthwellgroup.com.

The University of Massachusetts Boston

The University of Massachusetts Boston is nationally recognized as a model of excellence for urban public universities. Part of the UMass system, UMass Boston combines a small-college experience with the vast resources of a major research university. With a 16:1 student-to-faculty ratio, students easily interact with professors because most teaching occurs in small class sizes. Ninety-three percent of full-time faculty hold the highest degree in their fields.

UMass Boston's academic excellence is reflected by a growing student body of 17,030 undergraduate and graduate students. The university's 11 colleges and schools offer 82 undergraduate programs and 126 graduate programs. The Honors College serves 535 students who thrive on intellectual challenge. Enriched courses probe more deeply into theory or venture further into application. UMass Boston's diverse student body provides a global context for student learning.

For more information, visit The University of Massachusetts Boston at: www.umb.edu