The GEM Framework

Gender Equality Mainstreaming for Business Growth and Impact

A Step-by-Step Manual for Investors and Capacity Builders

MEDA

USAID — FROM THE AMERICAN PEOPLE

ENDORSEMENTS for the GEM FRAMEWORK

Since its inception, SEAF has been committed to investing in women-led businesses, recognizing their value as entrepreneurs. As SEAF looks to take its commitment to gender equality and women's economic empowerment to the next level, we will look to MEDA's GEM Framework as an invaluable tool to aid our journey. Highly recommended!

Robert Webster, Managing Director, Small Enterprise Assistance Fund

MEDA's Gender Equality Mainstreaming Framework (GEM Framework) provides investors, donors, intermediaries and other stakeholders with an open source toolkit for assessing gender performance of companies, as well as guidance on how to improve gender outcomes within business policies and practices…Quite simply, this is the tool for which we have all be waiting. I predict this resource will be the go-to reference material for those seeking to create gender equitable social change through their investment process.

**Joy Anderson
Founder and President, Criterion Institute**

Gender lens investing (GLI) is taking off in Asia. We have seen rapid growth in the interest of investors, companies and donors in the region. While the desire to be more inclusive is strong, there is a need for more practical guidance and support for the expansion and success of GLI initiatives. The MEDA GEM Framework is a comprehensive tool that enables the gender performance of companies and portfolios to be assessed, gaps and opportunities identified, and actions to be taken. AVPN is excited to share the GEM Framework with its 420+ members and looks forward to advances in GLI!

Naina Subberwal Batra, CEO, Asia Venture Philanthropy Network

The GEM Framework is focused squarely on being an agent of change. It is a resource that moves beyond consultation to action by assisting private companies to understand and change the way they behave vis-à-vis women. The world needs more GEM.

Gerhard Pries, CEO and Managing Partner, Sarona Asset Management

USAID was proud to support this groundbreaking research initiative to advance women's economic empowerment through investment. This new framework establishes a practical, business-oriented way for companies to be more gender equitable while supporting business growth. By approaching gender equality through an investor's lens, we believe the impact on women's economic empowerment can be both sustainable and transformative.

Gloria Steele, Senior Deputy Assistant Administrator, USAID Asia Bureau

The GEM Framework is the real deal. Informed by its authors' deep field experience in women's economic empowerment, it's a systematic tool for investors and companies that fills a longstanding gap in ESG practice and better prepares all of us to advance the effective practice of gender lens investing. Congratulations to MEDA and USAID for this important contribution. Now let's get to work.

**Edward Jackson
President, E. T. Jackson and Associates and Senior Research Fellow, Carleton University**

The interest in gender lens investing has been clearly documented but what has been less clear is a practical framework. The Gender Equality Mainstreaming Framework couldn't be a more timely resource.

Jackie VanderBrug, Managing Director and Investment Strategist, Global Wealth & Investment Management, Bank of America Corporation

The GEM on-line self-assessment offers a low-cost, easy-to-use and immediate first step for institutions to gain insight into their performance on gender issues. It is wide-ranging and thought-provoking and can be an effective tool for management teams as they think about process improvements to attract, retain, promote and reward female talent. Women's World Banking looks forward to partnering with MEDA on the advancement of women as staff, management and leaders of their organizations.

CJ Juhasz, Chief Investment Officer, Women's World Banking, Asset Management

Mennonite Economic Development Associates, Global Programs

Devon Krainer, Linda Jones, Shahnewaz Karim and Katie Turner
Created with support from USAID/ASIA and the Asia and Middle East Economic Growth Best Practices Project

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Foreword

In recent years, great strides have been made in responsible investment in frontier and emerging markets, with significant energy and resources allocated to critical issues such as environmental protection, decent work and good governance. However, while there has been forward movement, gender inclusion has remained a challenge as inequality gaps persist for women entrepreneurs as well as within businesses that engage women as suppliers, employees and consumers.

As Criterion Institute has reported over the past few years, incorporating a gender analysis into a financial analysis leads to better investment decisions that can increase returns and lower risk. Yet, even for those who want to incorporate a gender analysis into their investment decision-making face challenges in implementation. One of the key barriers is the availability of robust guidance and reference materials. Investors who are looking to up their game in gender lens investing repeatedly ask for tools that explicitly break down the steps to look at gender in their investments. Gender analysis is perceived as a mystery, MEDA's GEM Framework makes it accessible.

MEDA's Gender Equality Mainstreaming Framework (GEM Framework) provides investors, donors, intermediaries and other stakeholders with an open source toolkit for assessing gender performance of companies, as well as guidance on how to improve gender outcomes within business policies and practices. It builds on the environmental, social and governance (ESG) standard to enable analysis and upgrading across ESG criteria – elevating gender to a cross-cutting theme. Too often gender is represented by a tick box buried in the appendix, this resource brings gender to the front end of analyzing business operations, both the opportunities and the risks.

Applicable throughout the investment life cycle – investment readiness of companies, due diligence processes, post investment upgrading and impact measurement – the GEM Framework demystifies gender mainstreaming in this straightforward and detailed how-to manual. The tactical tools in this document are invaluable, from the draft email to introduce an interview process to the approach to evaluating results of the assessment. The GEM Framework provides an explicit approach for an investor to incorporate a gender lens into their financial decision-making.

Quite simply, this is the tool for which we have all be waiting. I predict this resource will be the go-to reference material for those seeking to create gender equitable social change through their investment process.

Joy Anderson
Founder and President
Criterion Institute
March 2018

Preface

For decades, MEDA has been at the forefront of integrating gender equality and women's empowerment with innovation in private sector development. Over the years we have been: a pioneer in the development of the microfinance industry in Latin America and then globally; an innovator in women's agricultural value chain projects in countries as diverse as Myanmar, Afghanistan, Jordan and Ghana; an originator of breakthrough business service models for women in challenging environments such as Libya, Pakistan and Ethiopia; and a leader in mainstreaming gender equality and women's empowerment across all of our programming.

In order to create sustainable change in economic sectors, MEDA brings a 'business solutions' approach to our project design and implementation, with local private sector partners key to our successful interventions and dynamic results. Recently, we have spearheaded new approaches in blended finance and impact investment, partnering with fund managers, companies, donor agencies and intermediaries to achieve notable development outcomes. Given our long-standing commitment to gender equality and business growth, we have sought new methods for empowering women as employees, suppliers, consumers and business leaders of investee companies.

The GEM Framework is a product of our efforts to advance gender equality, business growth and impact. This manual builds on MEDA's expertise in financial sectors and women's economic empowerment to create a resource for gender equality mainstreaming in target companies. Although there are other resources for assessing gender in businesses, this manual takes an 'ESG' lens, based on a de facto industry standard that incorporates environmental, social and governance criteria into the assessment and upgrading of company performance. Further, we elevate gender from its position in the 'social' domain of ESG to mainstream gender considerations across all areas of business operations. Given the widespread adoption of ESG in investments and the growing commitment to gender equality, the marrying of the two provides an entry point for investors and companies to rapidly adapt and improve policies and practices for inclusive business growth.

We hope that this manual will be a useful resource for our colleagues around the world, and will enable companies and the women and men with which they engage to contribute to sustainable and equitable growth for all.

Linda Jones, Ph.D.
Senior Director, Global Programs
MEDA
March 2018

List of acronyms

CEO	Chief Executive Officer
COO	Chief Operating Officer
EBITDA	Earnings Before Interest, Tax, Depreciation and Amortization
ESG	Environmental, Social and Governance
FGD	Focus Group Discussion
EDGE	Economic Dividends for Gender Equality Certification
GEM	Gender Equality Mainstreaming
GIIN	Global Impact Investing Network
HR	Human Resources
ICRW	International Centre for Research on Women
KPI	Key Performance Indicator
IML	Implementation, Monitoring and Learning
MEDA	Mennonite Economic Development Associates
NGO	Non-Governmental Organization
TA	Technical Assistance
UN	United Nations
UNFPA	United Nations Population Fund
WEPs	Women's Empowerment Principles

Glossary of terms

Capacity builder

Capacity builders, also known as technical assistance providers, include any organization developing the capabilities and competencies of businesses and other organizations including investment fund managers. Capacity builders can be many different types of organizations or individual consultants; they may provide investment readiness support to companies (e.g. accelerators), source investable opportunities for fund managers, offer business development services to companies, or manage challenge grant programs, among others.

ESG

ESG is a widely used approach in the investment industry that allows for the upgrading and measurement of a company or portfolio's performance across environmental, social and governance (ESG) areas. There is not just one standard for ESG and many large investors and industry associations (e.g. GIIN) have developed their own approaches, processes and tools for applying and measuring ESG criteria. The intent of the manual is to provide a resource for gender equality mainstreaming across different approaches to ESG but with a focus on business growth and impact.

Gender

Gender refers to the array of socially constructed roles and relationships, personality traits, attitudes, behaviours, values, relative power and influence that society ascribes to the two sexes on a differential basis. Whereas biological sex is determined by genetic and anatomical characteristics, gender is an acquired identity that is learned, changes over time, and varies widely within and across cultures (UN, 2011). In this manual, whereas we aim to be inclusive of gender, our focus has been largely inspired by the inequalities faced by women in private sector growth and investment decisions.

Gender equality

Gender equality implies a society in which women and men enjoy the same opportunities, outcomes, rights and obligations in all spheres of life. Equality between men and women exists when both sexes are able to share equally in the distribution of power and influence; have equal opportunities for financial independence through work or through setting up businesses; enjoy equal access to education and the opportunity to develop personal ambitions (UNFPA, 2017). The majority, but not all, gender inequalities faced in today's world favour men over women and this is the implication of many statements and indicators set out in this manual.

Gender mainstreaming

Gender mainstreaming is a globally accepted strategy for promoting gender equality. Mainstreaming is not an end in itself, but a strategy and an approach, as a means to achieve the goal of gender equality. Mainstreaming involves ensuring that gender perspectives and attention to the goal of gender equality are central to all activities – policy development, research, advocacy/dialogue, legislation, resource allocation, planning, implementation and monitoring of programmes and projects (UN Women, 2017).

Gender equality mainstreaming in ESG

Mainstreaming gender equality in ESG, or gendered ESG, is the process of integrating gender data and analysis into environmental, social and governance criteria. Gender data and analysis supports gender equality mainstreaming by demonstrating the different ways in which women and men participate in, contribute to, and benefit from gender-inclusive business operations as employees, leaders, suppliers, consumers and community members.

Investor

Institutions or individuals who make investments into companies, organizations, or funds with the expectation of financial and/or social and environmental results. This manual is designed for investors including venture capitalists, private equity and debt funds, public equities, development finance institutions, foundations, government donors, multilateral organizations, and NGOs.

Investee company

A company that has received investment capital from an investor. Also known as a portfolio company.

Women's economic empowerment

A woman is economically empowered when she has both the ability to succeed and advance economically and the power to make and act on economic decisions. To succeed and advance economically, women need the skills and resources to compete in markets, as well as fair and equal access to economic institutions. To have the power and agency to benefit from economic activities, women need to have the ability to make and act on decisions and control resources and profits (ICRW, 2016).

Part A
Introduction

Why gender equality mainstreaming in business?

Women are key drivers of economic growth, engaging in business as consumers, employees, leaders, suppliers and community stakeholders. Yet, women are frequently overlooked and underrepresented in the private sector globally. If women participated in the economy at the same level as men, $28 trillion could be added to annual global GDP by 2025 (McKinsey, 2015).

The majority of investors have not taken advantage of the "gender dividend" – a strategy to empower women in business that yields financial benefits including increased sales, expanded markets, improved recruitment and retention, among others (Deloitte, 2017). Despite growing interest in the field of gender lens investing (Criterion, 2015), the lack of uptake is partly due to the dearth of gender standards and strategies available in the investment industry. To address this gap, the Gender Equality Mainstreaming (GEM) Framework was developed as a guide for investors, capacity builders and other stakeholders to implement inclusive business growth strategies.

In partnership with USAID's Asia Bureau, Chemonics International, and Sarona Asset Management, the GEM Framework was first piloted by MEDA in response to demand from emerging market private equity investment funds who were concerned about impact and business growth. This framework was refined following the pilot, which engaged local fund managers and investee companies in India and Indonesia. The resulting framework and tools can be applied more broadly in inclusive business growth initiatives, and will therefore also be useful for donor-funded projects, public equities and capacity builders with a gender equality focus.

What is the GEM Framework?

The Gender Equality Mainstreaming (GEM) Framework is an approach that is presented here as a how-to manual – a practical guide and toolkit – for assessing gender equality, and identifying, implementing and measuring gender equality mainstreaming strategies within companies. The framework builds upon the environmental, social and governance (ESG) investment standard by mainstreaming gender across a range of ESG criteria.

Designed for investors and capacity builders, the ultimate aim of the framework is to transform companies to be more gender equitable while supporting business growth and impact.

The following definition of gender equality guides the framework's approach:

> Gender equality implies a society in which women and men enjoy the same opportunities, outcomes, rights and obligations in all spheres of life. Equality between men and women exists when both sexes are able to share equally in the distribution of power and influence; have equal opportunities for financial independence through work or through setting up businesses; enjoy equal access to education and the opportunity to develop personal ambitions (UNFPA, 2017).

In this manual, whereas we aim to be inclusive of gender, our focus has been largely inspired by the inequalities faced by women in private sector growth and investment decisions. That is, the majority, but not all, gender inequalities faced in today's world favour men over women and this is the implication of many statements and indicators set out in this manual. Consequently, this resource supports progress towards achieving the Sustainable Development Goals, in particular contributing to Goal 5, Gender Equality.

The GEM Framework is made up of two parts:

- **Part A** is the introduction to the GEM Framework. It includes the rationale for gender equality mainstreaming and ESG, what the Framework is, who it is for, the benefits of using it, and how it can be applied.

- **Part B** is the step-by-step manual describing how to implement the GEM Framework. The manual is organized into six steps. Each step includes guidance and a specific set of tools for investors and capacity builders.

Why mainstream gender equality across the ESG standard?

The ESG standard is widely used by investors and capacity builders as a way to sustain a company's competitive advantage (Morgan Stanley, 2017) while contributing to impact. Common approaches include mitigating the ESG risks that are most material to a company's growth, or upgrading ESG policies and practices to improve financial performance and attract further investment. Researchers have found a correlation between companies with high ESG integration and those that are well-managed and profitable (Friede, Busch and Bassen, 2015). Yet in current applications of ESG, gender is often under-leveraged because it is pigeonholed in the 'social' area of ESG. Consequently, the GEM Framework mainstreams gender across all three ESG areas. By elevating gender across ESG criteria, users of the framework are better equipped to both unlock the financial potential resulting from the empowerment of women and to contribute to gender equality and women's empowerment.

What does mainstreaming gender equality in ESG mean?

Mainstreaming gender equality in ESG, or **gendered ESG**, is the process of integrating gender data and analysis into the environmental, social and governance standard. Gender data and analysis support gender equality mainstreaming by demonstrating the different ways in which women and men participate in, contribute to, and benefit from gender-inclusive business operations.

It is important to note there are a variety of industry tools such as EDGE and WEPs Gender Gap Analysis that offer guidance on advancing gender equality in business. The GEM Framework is distinct and complementary to these tools because it centers on the ESG investment standard, and is therefore targeting business growth and impact.

Who can use the GEM Framework?

The GEM Framework is designed for use by investors and capacity builders. Organizations may find this manual useful if they invest in or provide support to companies with the dual objective to improve business growth and impact, with an emphasis on gender equality and women's empowerment. The GEM Framework is not exclusive to private companies, but can also apply to public equities, social enterprises, non-profit organizations and donor-funded projects.

For companies who want to use the GEM Framework themselves, specific guidance is included in each step of the manual described in Part B.

Users of the GEM Framework — Investors, Companies, Capacity Builders
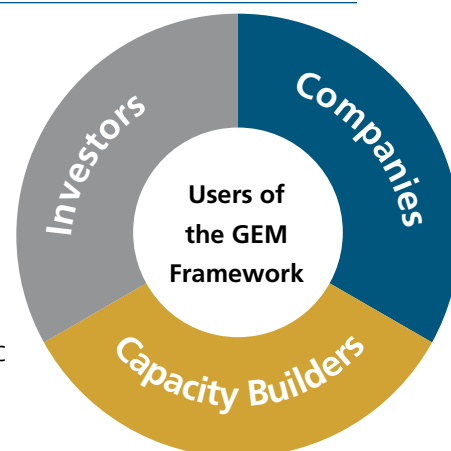
GEM for investors

The primary audience for this manual is investors and other stakeholders who play an active role in identifying, managing or otherwise supporting investee companies. Venture capitalists, private equity and debt funds, public equities, development finance institutions, foundations, government donors, multilateral organizations, and non-governmental organizations (NGOs) are a few examples of such investors. These investors stand to gain the greatest value from the GEM process because of their direct interest in improving company growth and impact. Other types of investors such as pension funds, wealth managers and insurance companies can also play a crucial role in promoting gender equitable business practices through their investment policies and shareholder engagement.

While targeting investors, the manual is specifically designed for implementation by capacity builders in partnership with investors. In some instances, despite the value of an outside provider, investors may have the internal capacity to implement the framework themselves.

GEM for capacity builders

Capacity builders are an essential user of the GEM Framework because they frequently work with investors to advise, facilitate and implement gender sensitive investment strategies. Capacity builders also provide support to improve business operations, strategy and impact including in gender equality. Examples of capacity building organizations include technical assistance providers, consultants, incubators, accelerators, business development service providers, and NGOs.

Capacity builders who have expertise in gender and investment in-house are equipped to use the GEM Framework without external support. However, if these capabilities are lacking, they can engage an external provider as recommended for investors.

Those who apply the GEM Framework are experienced in gender equality, investment, ESG and business operations. Capacity builders are typically the most appropriate to facilitate a gender equality mainstreaming process, offering both the requisite technical expertise as well as an unbiased perspective that is essential for gender-based analysis and decision making.

What are the benefits of GEM?

For **investors**, the GEM Framework can be applied throughout the investment cycle from initial pipeline screening and company selection, to identifying technical needs and support approaches, through to post-investment support and impact measurement. Applications include:

Pipeline screening and company selection which incorporate impact criteria.

Due diligence procedures that analyze gender performance and define action plans to improve business policies and practices aligned with the ESG standard.

Create value for target companies by enabling the assessment, development and implementation of gender strategies for investees, which in turn generate business outcomes including reduction in costs, risk mitigation, new revenue streams, product innovation, improved reputation, etc.

Identify and monitor gendered ESG opportunities and risks that are most material to an investor's portfolio and impact objectives.

Measure, demonstrate and report impact to investors.

Attract investors with gender lens investing strategies.

Increase ease of portfolio exits.

For **capacity builders**, the GEM Framework can be used to:

- Deliver technical support to investors by leading the application of the GEM Framework (e.g. gender lens applied to due diligence procedures, impact measurement and reporting, etc.)

- Determine eligibility of companies for capacity building by conducting gender assessments aligned to the ESG standard.

- Develop business growth and impact plans for companies that promote women's empowerment and improve financial performance.

- Improve the investment readiness of businesses through mainstreaming gender equality in company policies and practices.

- Enhance the impact measurement capabilities of companies through gender mainstreamed ESG indicators and measurement plans.

For **companies**, the GEM Framework can be used to:

- Identify business opportunities and risks in target markets, human resources, company policies, board governance, supply chain management, and environmental sustainability.

- Obtain customized inclusive business strategies providing a wide range of business benefits including: better management of critical business risks, improved employee capabilities, productivity and retention, larger and more varied talent pool, reduced costs, boosted reputation, market insights, expanded markets, increased sales and profitability, and improved corporate strategy.

- Implement viable gender-specific business strategies such as:
  - Establish company policies that promote gender equality such as anti-discrimination, fair compensation, fair hiring and sexual harassment that can reduce risk, increase staff productivity and retention, and attract new talent.
  - Launch a marketing strategy targeting women customers to increase sales (e.g. adjusting pricing, changing placement or design of products, or adapting promotions to reach women customers with the right value proposition).
  - Diversify sourcing from both women and men individual and small-scale suppliers to mitigate supply chain risks, improve reliability and reduce costs.

- Demonstrate, measure and report gender impact that aligns with ESG metrics to shareholders, customers, community, and other interested parties.

- Attract external investment and co-financing.

How to use the GEM Framework

The GEM Framework is a manual for investors and capacity builders. Part A, this section, provides an introduction, while Part B explains the six practical steps and tools of the GEM Framework – from identifying target companies to measuring the impact of gender equality mainstreaming strategies within those companies.

Each practical step has a set of associated tools. These tools are classified into five types:

GUIDANCE	Practical guidance on how to facilitate a process within the GEM Framework.
INTERVIEW	A set of questions to gain GEM data about a company.
TIP	Recommended tips for conducting an activity more effectively.
COMMUNICATION	Suggested templates for communicating various aspects of GEM to stakeholders including companies and investors.
PLANNING	Recommended templates to assist in planning the implementation or impact measurement of GEM strategies.

At the beginning of each tool, the purpose, intended user, and description of the tool are specified, as such:

Purpose	
User	
Description	

The GEM Framework is made up of general steps and tools that can be modified by the user to fit their specific needs and local context. The framework does not outline a rigid process – but rather offers a flexible road-map for organizations seeking to improve company capacity and action in gender equality mainstreaming. Certain steps and tools will be appropriate for some users and not others. The tools within each step can also be adapted to better suit user requirements.

Overview of Part B – The Step-by-Step GEM Manual

The following six steps are described in detail in *Part B – The Step-by-Step GEM Manual.*

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
IDENTIFICATION	SCOPING ASSESSMENT	FULL ASSESSMENT	STRATEGY DEVELOPMENT	IMPLEMENTATION, MONITORING & LEARNING	IMPACT MEASUREMENT

Each step of the GEM Framework includes a set of associated tools that are described below. The overall purpose of each step is also defined.

STEP 1 | IDENTIFICATION	
Purpose	Determine whether a company is an appropriate candidate for gender equality mainstreaming.
GUIDANCE	Guidance Tool: Company Selection
GUIDANCE	Guidance Tool: Company Timing
TIP	Tip Sheet Tool: Company Incentives
COMMUNICATION	Communication Tool: Promoting GEM to Investors
COMMUNICATION	Communication Tool: Promoting GEM to Companies

STEP 2 | SCOPING ASSESSMENT	
Purpose	Complete a high-level assessment of company performance in gender equality mainstreaming in business practices and policies.
GUIDANCE	Guidance Tool: Facilitating a Scoping Assessment
COMMUNICATION	Communication Tool: Setting up an Assessment
INTERVIEW	Interview Tool: Scoping Assessment
GUIDANCE	Guidance Tool: Analyzing Assessment Results

STEP 3 | FULL ASSESSMENT	
Purpose	Conduct an in-depth assessment of company performance and capacity in gender equality mainstreaming and identifying opportunities for improvement.
GUIDANCE	Guidance Tool: Facilitating a Full Assessment
COMMUNICATION	Communication Tool: Setting up an Assessment
COMMUNICATION	Communication Tool: Assessment Schedule
COMMUNICATION	Communication Tool: Assessment Data Brief
INTERVIEW	Interview Tool: Full Assessment
INTERVIEW	Interview Tool: Focus Group Discussion
GUIDANCE	Guidance Tool: Facilitator Observations
GUIDANCE	Guidance Tool: GEM Report Preparation

STEP 4 | STRATEGY DEVELOPMENT	
Purpose	Develop gender equality mainstreaming strategies and plans in collaboration with companies that align with their business growth and impact priorities.
GUIDANCE	Guidance Tool: Facilitating Strategy Development
COMMUNICATION	Communication Tool: GEM Report
INTERVIEW	Interview Tool: GEM Report Feedback
GUIDANCE	Guidance Tool: Implementing Actors
PLANNING	Planning Tool: Implementation Plan

STEP 5 | IMPLEMENTATION, MONITORING & LEARNING	
Purpose	Monitor and learn from the implementation of gender equality mainstreaming strategies, and use as a management feedback loop when time permits.
GUIDANCE	Guidance Tool: Implementation, Monitoring and Learning
TIP	Tip Sheet Tool: Successful Implementation of GEM Strategies
PLANNING	Planning Tool: Implementing Gendered Policies
PLANNING	Planning Tool: Indicators for Employee Diversity Performance Management System
PLANNING	Planning Tool: Basic Monitoring Plan
GUIDANCE	Guidance Tool: Facilitated Learning
GUIDANCE	Guidance Tool: GEM Next Steps

STEP 6 | IMPACT MEASUREMENT	
Purpose	Measure the long-term impacts of gender equality mainstreaming initiatives and business operations.
GUIDANCE	Guidance Tool: Developing GEM Key Performance Indicators
PLANNING	Planning Tool: Impact Measurement Plan

What is the framework's approach to gender equality?

To mainstream gender equality, it is critical to understand the relevant context. As such, the framework encourages users to examine the company culture, local business environment, regulatory framework and prevailing social norms to understand women and men's roles and how best to advance gender equality.

Although equality of both genders is paramount, the framework emphasizes the empowerment of women, since in most countries, it is women that are at a disadvantage in the market relative to men (WEF, 2017). In response, aspects of the framework are designed to identify and overcome barriers specifically experienced by women. This is emphasized in the design of the GEM assessment tools, where women are listed before men in the wording of questions. The framework also offers additional strategies to improve women's economic empowerment. It is important to note that men play a key role in achieving greater gender equality through offering diverse perspectives, reducing barriers, championing women's equality, entering unconventional roles themselves, and influencing shifts in social norms.

What is the time commitment for implementing the GEM Framework?

The time required to complete the six steps of the GEM Framework is highly flexible and can be modified to the needs of the user. For the assessment alone, the scoping and full assessments can be completed within a month. However, when also implementing an upgrading strategy, it is recommended to spend a minimum of nine months from identification of companies to completion of implementation (Steps 1 through 5). After completing Step 5 – Implementation, Monitoring & Learning, a minimum of one year is recommended for Step 6 – Impact Measurement.

Part B
Step-by-Step GEM Manual

Step 1
Identification

STEP 1 IDENTIFICATION	STEP 2 SCOPING ASSESSMENT	STEP 3 FULL ASSESSMENT	STEP 4 STRATEGY DEVELOPMENT	STEP 5 IMPLEMENTATION MONITORING & LEARNING	STEP 6 IMPACT MEASUREMENT

Determine whether a company is an appropriate candidate for gender equality mainstreaming.

The first step is to identify companies suitable for gender equality mainstreaming. This step is not necessary if participating companies have already been selected.

Who can select companies for GEM?

Investors and capacity builders are appropriate for identifying companies to participate in GEM, and may have different motivations for selecting participating companies. For example, a private equity investor may decide to assess all companies in a portfolio or target companies in which they are interested in investing; implementing agencies might select companies that are participating in a project or are being incubated for possible future investment. Despite the value of involving investors or capacity builders, companies may decide to self-select and complete the GEM steps on their own (see Self-Guided Company section below).

How to select companies for GEM?

Companies can be identified by establishing selection criteria and evaluating them based on these criteria. Optimally, the GEM Framework is designed for companies that show a desire to grow their business and impact, and are seeking or already receiving investment. GEM can be used with companies from any sector. The size and maturity of the company can be considered when determining if a company is appropriate for GEM.

Guidance Tool: Company Selection

Guidance Tool: Company Timing

During the selection process, it is critical that companies show a desire or willingness to learn about GEM, as it is not productive to mainstream gender equality with companies that are reluctant to participate.

Tip Sheet Tool: Company Incentives

Communication Tool: Promoting GEM to Investors

Communication Tool: Promoting GEM to Companies

Self-Guided Company

A company may decide to complete GEM independently. For these companies, the senior management team can discuss if the company profile (e.g. size, maturity, etc.) and timing is right to pursue GEM.

Guidance Tool: Company Selection   Guidance Tool: Company Timing

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Guidance Tool: Company Selection

Purpose	Suggested guidance to select companies for gender equality mainstreaming.
User	Investor or capacity builder
Description	Although any company can benefit from a review of their gender performance, the following guidance recommend criteria that are optimal for companies to be assessed and to participate in an upgrading strategy. In general, it is suggested that companies fulfill most criteria. However, there are cases where a company does not meet the majority of criteria but are still appropriate to use the GEM Framework. For example, a family-owned business with no established board or outside investors, but who has a strong motivation to grow the business. Moreover, despite our application of the GEM Framework to private companies, it can also be implemented with social enterprises, public equities and non-profit organizations.

Company selection guidelines

Number of employees	At least 10 employees
Years of operation	At least two years
Degree of formalization	The business is registered and producing audited financial statements
Sr management team	At least two members
Board of directors	Established board of directors
Shareholder structure	May include one outside investor

Guidance Tool: Company Timing

Purpose	Guiding discussion questions that assist in determining if this is the right time for the company to participate in GEM.
User	Investor, capacity builder or company
Description	This tool offers a set of questions to gauge if gender equality mainstreaming is a viable strategy for the company to pursue at present. Participants in this discussion represent women and men and a diversity of departments.

Discussion questions

1.	Why is the company interested in gender equality mainstreaming?
2.	What is the company hoping to achieve through the application of the GEM Framework? Is it aligned with the strategic priorities of the business?
3.	Is there buy-in for GEM at the senior management and board levels?
4.	Which steps in the GEM Framework seem relevant to the company now? Why?
5.	Does the company have the internal resources to take this on now?
6.	How much time does the company have available to take this on?
7.	Who in the company will champion this effort? What other team members need to be involved?
8.	Does the company have resources available to involve external consultants or organizations?
9.	If resources are available, what external consultants or organizations would be engaged and what role would they play?
10.	How will the company know if they were successful?
11.	How will the company communicate this staff and external parties?

Guidance for analyzing responses

A company does not need to answer all questions in the affirmative to be suitable for a GEM assessment and strategy development. If responses are generally positive, the company is most likely appropriate to proceed to Step 2 – Scoping Assessment. Positive results are indicated by company interest in GEM, alignment with business priorities, buy-in from senior management and board, availability of financial and human resources, access to external consultants, a shared understanding of what success looks like, and a defined communications plan.

Tip Sheet Tool: Company Incentives

Purpose	Tips for encouraging companies to participate in GEM.
User	Investor or capacity builder
Description	This tool contains three factors which can motivate companies to engage in GEM: economic incentives, messaging and entry point.

Economic incentives

Economic incentives can go a long way to encourage companies to pursue GEM. Companies may not want to pay for GEM because the return on investment can be difficult to calculate as there is a lack of industry evidence (though this is changing). As such, a sponsoring organization such as a fund manager or bilateral donor may decide to cover a portion, or all the costs associated with the GEM steps. For instance, providing funding for GEM assessments (Steps 2 and 3) will support the identification of specific opportunities for companies to improve GEM, while at the same time boosting leadership and staff awareness of gender equality. Offering financial support for companies to implement GEM strategies (Steps 4 - 6) can be highly desirable because it is both a value creation strategy for the firm and a way to attract external investors.

Messaging

Since gender equality mainstreaming is not a widely known concept among companies and many investors, appropriate messaging of GEM is essential. The communication tools in Step 1 can assist organizations in articulating what GEM is, why it is a value creation opportunity, and what commitment is expected from companies who participate.

Entry point

The entry point through which a company is reached is important to consider. Investors are particularly influential in engaging investees in GEM due to their pivotal role in financing companies. Capacity building organizations, such as accelerator programs focused on investment readiness, are also well-positioned to reach companies as they offer the potential for attracting investment.

Communication Tool: Promoting GEM to Investors

Purpose	To promote GEM to investors as an opportunity to create value for companies.
User	Capacity builder
Description	This tool is used to convince an investor of the value of GEM and to secure investor support for their portfolio companies participating in the GEM steps. The tool provides a sample email template to introduce the investor to the GEM steps and the expected gender and financial benefits of GEM for investees. This email is for illustrative purposes only. Communications with investors are modified based on the context. For instance, some investors may expect further program details (the subsequent communication tool describes the program in greater detail). Resourcing, partnerships and other key areas will influence the messaging to investors.

Dear [investor]:

We recently formed an exciting new initiative with [list partnering organizations such as capacity builders, funders, investors, etc.] that you may be interested in. This initiative offers the opportunity to enhance company performance through greater inclusion of women as employees, leaders, customers and suppliers.

We have resources available for technical assistance to support portfolio companies in leveraging women as economic actors to drive business growth and impact. As part of this technical assistance, companies in your portfolio can take advantage of an expert consultant that would help assess the company's ability to attract, retain, promote and motivate its women staff, managers and board members and identify new ways to engage with women customers and suppliers as well.

Following the consultant's assessment, a report would identify gaps and opportunities in gender that have a material impact on the portfolio company with recommendations for improvement. We are pleased to offer a limited amount of technical assistance support to companies to adapt and implement these solutions.

Why are women important in creating shareholder value in businesses?

As you are likely aware, there are many studies demonstrating the economic benefits of including women. One such study completed by private equity firm Sarona Asset Management, in partnership with University of Waterloo and MEDA, found that companies with higher percentages of female employees and managers reported positive financial out-performance (two and three year top line and bottom line growth) and statistically significant positive out-performance for companies with above average female board membership. These findings emerged from a review of Sarona's 180+ companies in its portfolios. These results point to an opportunity to engage women clients, staff, managers and board members in new ways to create sustainable, long-term shareholder wealth.

Would you or someone on your team be interested in setting up an introductory call to discuss whether you and your portfolio companies might be interested in this value creating opportunity?

We look forward to hearing from you.

Communication Tool: Promoting GEM to Companies ⊜

Purpose	To promote the opportunity and explain the details of the GEM process to selected companies.
User	Capacity builder
Description	This tool is used with companies who qualify for GEM, offering suggested language to use to invite companies to participate in the GEM process, which begins with a Scoping Assessment (Step 2 – Scoping Assessment). Qualifying companies are determined by investors or capacity builders based on defined selection criteria (see guidance tools above). It is recommended to convey this information over the phone or in person. This briefing is for illustrative purposes only. Communications with companies are modified based on the context. Resourcing, partnerships and other key areas will influence the messaging to companies.

Hello [company manager]:

In partnership with [investor/capacity builder], [your company] is eligible to participate in an initiative focused on increasing women's participation and economic contributions to business. Women are everywhere in business - customers, employees, managers, board members, suppliers, etc. - but they are an underutilized resource globally. If women participated more fully in business, there is evidence that financial returns will follow. For example:

- *Employing women in nontraditional jobs could increase firms' productivity by 13-25% (IFC, 2013).*
- *Women-owned companies offer $285 billion in lending opportunities for financial firms (IFC, 2014).*
- *Companies with gender diverse boards generate a higher return on equity than those without (Credit Suisse, 2016).*
- *If women participated in the economy at the same level as men, $28 trillion would be added to annual global GDP by 2025 (McKinsey, 2015).*

This initiative has three main phases: [Although the GEM Framework involves six steps, they are consolidated into three phases here for streamlining of communications.]

Phase 1 – Scoping assessment

Your company is eligible to undergo a Scoping Assessment that seeks to understand where women and men are participating in your company's operations and where they are not active. The Scoping Assessment will take about one hour, plus prep time, and is conducted by a local consultant. The consultant would likely speak with the Head of Human Resources (HR) or the Chief Operating Officer (COO) or Chief Executive Officer (CEO).

The number of companies that move on from the Scoping Assessment to the Full Assessment will depend upon the level of interest we receive from investors and companies, and the types of responses we receive from the Scoping Assessment.

Phase 2 – Full Assessment

Following the Scoping Assessment, a select number of companies will be invited to undergo a full assessment which involves:

- *Approximately two days visiting the company premises to learn where women and men are active in the business and why that is the case. The assessment format includes quantitative and qualitative questions and engages a variety of staff.*
- *Conducting meetings with the Head of HR and senior management team. We would also like to meet with a number of mid-level managers and entry level employees to gain a more full picture of the business.*

Following the Full Assessment, your company would receive a customized report with an analysis of the results, and recommendations on where and how the business can improve in engaging women that will also lead to positive financial performance for the firm. The company will be invited to review the recommendations and participate in a strategy development process to refine the strategies.

Phase 3 – Technical assistance

Your company will be invited to apply for technical assistance support to pilot select strategies in gender equality.

Examples of strategies:

- *How to better serve women customers. For example, conducting market research to develop products and marketing strategies that better meet women's needs*
- *Develop recruitment procedures and mentorship programs to increase the mobility of women employees to move into management positions*
- *Establishing an environmental policy that recognizes the needs and manages the risks of women and men community members*
- *Developing facilities on office premises that are more appropriate to women, i.e. lactation rooms, childcare facilities, or flexible working hours*
- *Board formalization and increasing recruitment of women directors*

As part of your participation, we will define an impact measurement plan to measure the long-term financial and social impact of the gender strategies.

Do you have any questions at this time? Are you interested in participating in this value creation opportunity through gender equality mainstreaming?

Step 2
Scoping
Assessment

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
IDENTIFICATION	SCOPING ASSESSMENT	FULL ASSESSMENT	STRATEGY DEVELOPMENT	IMPLEMENTATION MONITORING & LEARNING	IMPACT MEASUREMENT

Complete a high-level assessment of company performance in gender equality mainstreaming in business practices and policies.

Once a company is identified for GEM, the next step is to conduct a Scoping Assessment to get a high-level understanding of a company's gender performance.

What is the Scoping Assessment?

The Scoping Assessment provides a snapshot of a company's current performance in gender equality mainstreaming. The assessment is organized by ESG thematic area, mainstreaming gender across each area. This simple assessment, which asks quantitative, close-ended questions, is brief compared to the Full Assessment described in Step 3.

Guidance Tool: Facilitating a Scoping Assessment

Communication Tool: Setting up an Assessment

Interview Tool: Scoping Assessment

Guidance Tool: Analyzing Assessment Results

What can the Scoping Assessment be used for?

The Scoping Assessment can be used in several different ways:

- **Investors** and **capacity builders** can discern whether a company can generate gendered ESG data and is interested in GEM activities. It can also pinpoint operational areas within the company for further research and improvement. These factors are used to determine whether the company is appropriate for moving on to Step 3 – Full Assessment.

- **Investors** can use the Scoping Assessment as a standalone step for investment deal screening. This enables them to integrate gendered ESG analysis into investment prospecting.

- **Capacity builders** use the Scoping Assessment as a standalone step in various ways, such as vetting potential clients or providing a light touch evaluation of client's performance mainstreaming gender across ESG.

Who can conduct a Scoping Assessment?

Capacity builders with gender, ESG and business experience are best positioned to carry out this assessment. In general, it is preferable to use a capacity builder since they are less likely to be influenced by gender and other biases. It is ideal to have a team of women and men facilitate the assessment.

Self-Guided Company

A company may decide to complete GEM independently. Instead of using the tools in Step 2, companies can access the GEM online self-assessment. This online tool is designed specifically for companies doing a gender assessment themselves. It is longer in length than the Scoping Assessment but shorter than the Full Assessment. After completing the online self-assessment, companies receive a score and recommendations on how to improve GEM for each ESG standard. It can be accessed at: https://www.meda.org/self-assessment.

Guidance Tool: Facilitating a Scoping Assessment

Purpose	To prepare, conduct and complete a GEM Scoping Assessment with a company.
User	Capacity builder (preferred) or investor
Description	This tool provides guidance on how to conduct a Scoping Assessment effectively. It specifies what to prepare beforehand, who at the company responds, considerations to keep in mind during the interview, an explanation of the interview tool itself, and next steps.

How to conduct the Scoping Assessment?

The Scoping Assessment can be completed over the phone or in-person. The advantage of conducting in-person is the facilitator can read non-verbal cues, observe the company facility and atmosphere, establish rapport with the company, and discuss gender in the workplace more generally. On the other hand, conducting the scoping assessment over the phone is an expedient use of time and resources.

Interview Tool: Scoping Assessment

It is strongly recommended that a local consultant conduct the Scoping Assessment, as this allows for communication in local language and ease of scheduling with the company.

Who responds to the Scoping Assessment?

A member of the executive team, such as the Chief Executive Officer or Chief of Operations, or the Head of Human Resources from the company is appropriate to answer these questions.

What preparation is required before the Scoping Assessment?

- Schedule a time with the company for an interview (see communication tool in Step 2).

- Get to know the company through secondary research. If the introduction to the company took place via an investor or capacity builder, they may be able to share resources about the company (e.g. financial statements, reports, marketing materials).

- Using the Step 2 interview tool, fill out as much information as possible from secondary source materials (e.g. materials provided by investors, company website, news articles). Confirm this data with the respondent during the interview.

- Circulate the interview tool to the company at least one week in advance of the scheduled interview. This gives the company time to familiarize themselves with the interview content and identify the most suitable respondents.

Guidelines for facilitators during the Scoping Assessment

- It is suggested to conduct the interview in the preferred language of the respondent.

- Start the interview with an introduction such as the following script before proceeding with the questions.

> *[Organization Name] is conducting this interview to learn more about your business, and in particular, to understand how women and men are involved in your business, and the different roles that they play at your company. The ultimate purpose of this interview is to get a quick idea of where men and women may be able to participate or contribute more to the business. For example, we would like to know if women participate on the company's Board of Directors.*
>
> *[Describe the next step of GEM process to company if applicable: Upon completing this interview, your business may be eligible to participate in the next stage full assessment that is conducted in-person. Your participation in the next phase will depend upon your responses, as well as your company's interest to move forward with the full assessment.]*
>
> *This interview will take about one hour to complete and additional time may be needed to submit follow up data. All responses you provide will be strictly CONFIDENTIAL. Do you have any questions or comments at this point? We thank you in advance for your participation in this interview.*

- Be sure to ask the respondent all interview questions but do not pressure them to answer if they refuse or do not have the needed data.

- The respondent may not be able to answer certain questions during the interview because they need to search for the data. Make a note of these questions as they come up in the interview. At the end of the call, summarize these questions for the respondent and set a deadline for them to provide the answers as data is available.

- It may be helpful to use the table on the following page to record frequently repeated answers. The facilitator can fill in the interview template using the suggested acronyms where appropriate. Note that it would be unusual for a company to answer all questions, but at the same time, it is important to be as thorough as possible.

Acronym	Description	Definition / Standard Response
N/A	Not Applicable	The question was asked and the respondent answered that the question is not relevant to their business.
NM	Not Measured	The respondent does not track this information.
RA	Refuse to Answer	The respondent deflected or refused to answer the question.
NAs	Not Asked	The question was not asked because the facilitator determined that it was not relevant, there was insufficient time, etc.

What is included in the Scoping Assessment?

- Part I: Company profile
  A company profile is helpful to establish rapport and better understand business operations.

- Part II: Gender Equality Mainstreaming scoping profile
  The GEM profile is split into three sections that align with ESG areas. Each question will provide information on the company's ability to mainstream gender in business practices and policies. The assessment questions are classified into two levels. If the answer to the first-level question is "no," then skip to the next first-level question. If the answer to the first-level question is "yes," then ask the second-level question.

Level 1	Does the company have internal committees?	
Level 2		How many internal committees does the company have?

What is completed after the Scoping Assessment?

Guidance Tool: Analyzing Assessment Results

Communication Tool: Setting up an Assessment

Purpose	To arrange for a Scoping Assessment with the company.
User	Capacity builder
Description	This tool contains a suggested email template for preparing companies to participate in the Scoping Assessment. This email is for illustrative purposes only. Communications with companies are modified based on the context. Resourcing, partnerships and other key areas will influence the messaging to companies.

Dear [company manager],

Thank you so much for confirming your interest in this gender equality mainstreaming initiative. [Capacity building organization] is excited to engage [company name's] team to explore how women and men can contribute further to your business operations.

My name is [] and I am pleased to facilitate the Scoping Assessment with you. The purpose of the Scoping Assessment is to understand women and men's roles in company operations – as employees, board members, customers, suppliers and with respect to the environment. The assessment will take about one hour and can be done over the phone or in person. Additional time may be needed outside the meeting to respond to questions that ask about the number of women and men.

In preparation, I have attached the Scoping Assessment form which I will review with you during our meeting. It is likely that the Head of Human Resources, Chief Operating Officer or Chief Executive Officer is the most appropriate person to answer these questions, but that is up to you to decide. Would one of the following time slots work to schedule a meeting time?

[Insert proposed times]

We look forward to your participation in this first stage of the initiative.

Interview Tool: Scoping Assessment

Purpose	Questionnaire for the Scoping Assessment.
User	Capacity builder (preferred) or investor
Description	This tool contains questions to be used to conduct the Scoping Assessment interview with the company. A company profile is captured first, followed by a GEM profile that is organized by ESG area. The profile starts with the social component of ESG because it is usually the easiest for companies to respond to.

Part I: Company profile

Company name
Contact person's name
Contact person's position
Company's head office address
Date of scoping assessment
Name of interviewer
Annual revenue
Years of operation
Company sector(s)
Number of branches/stores (if applicable)
Company background (e.g. history, any pertinent facts, etc.)

Part II: GEM scoping profile

Social	
Employees	
1. How many women employees does the company have?	
2. How many men employees does the company have?	
3. How many of the company's management positions are held by women? (management positions refer to employees with staff that report directly to them)	
4. How many of the company's management positions are held by men?	
5. How many women employees were hired in the last 12 months?	
6. How many men employees were hired in the last 12 months?	
7. How many women employees were promoted in the last 12 months?	
8. How many men employees were promoted in the last 12 months?	
9. How many days does the company offer women employees for maternity leave?	
10. How many days does the company offer men employees for paternity leave?	
11. Are employees able to submit grievances and complaints including sexual harassment and discrimination anonymously?	Yes ❑ No ❑
Customers	
12. Do you sell products and services primarily to individual consumers or to businesses?	
13. How many of the company's individual customers were women in the last 12 months? (Company estimate is acceptable)	
14. How many of the company's individual customers were men in the last 12 months? (Company estimate is acceptable)	
15. Does the company sell goods and services that specifically target women?	Yes ❑ No ❑
16. Does the company sell goods and services that specifically target men?	Yes ❑ No ❑
Suppliers	
17. Does the company purchase products and services from large businesses and multinational corporations?	Yes ❑ No ❑
17a. Does the company analyze its suppliers' gender performance or commitments to gender equality?	Yes ❑ No ❑
18. Does the company purchase products and services from individuals and small business suppliers?	Yes ❑ No ❑
18a. Does the company track or have a general sense of the number of individual women and men suppliers including businesses owned/managed by women and men?	Yes ❑ No ❑

Governance

19. How many women are on the company's board?	
20. How many men are on the company's board?	
21. Is the company's CEO or equivalent position held by a woman?	Yes ❑ No ❑
22. Does the company have an Anti-Discrimination Policy?	Yes ❑ No ❑
23. Does the company have a Fair Compensation Policy?	Yes ❑ No ❑
24. Does the company have a Fair Hiring Policy?	Yes ❑ No ❑
25. Does the company have a Sexual Harassment Policy?	Yes ❑ No ❑
26. Does the company have internal committees?	Yes ❑ No ❑
26a. What internal committees does the company have?	
26b. Which internal committees are chaired by a woman?	

Environment

27. Has the company conducted training on environmentally sustainable practices for women and men employees?	Yes ❑ No ❑
28. Does the company have an environmental management system in place?	Yes ❑ No ❑
28a. Does the environmental management system address women and men's different concerns (e.g. as employees, suppliers, customers and community members)?	Yes ❑ No ❑
28b. How are women benefiting from the company's environmental management system (e.g. as employees, suppliers, customers and community members)?	
28c. How are men benefiting from the company's environmental management system (e.g. as employees, suppliers, customers and community members)?	
28d. To what extent have women and men each contributed to the development of the environmental management system (e.g. as managers, non-management level staff and individuals outside the company)?	

General remarks from the facilitator:

Guidance Tool: Analyzing Assessment Results

Purpose	To analyze the results from the Scoping Assessment and determine whether the company is appropriate for the Full Assessment in Step 3.
User	Capacity builder (preferred) or investor
Description	This tool offers guidance on how to review and evaluate company responses from the Scoping Assessment. Using the completed interview tool, the user can analyze company responses to better understand the company's current performance in gender equality mainstreaming across the ESG standard. During analysis, it is more important to focus on the gender gaps in business operations and the potential for impact, rather than identifying businesses already strong in GEM.

How to analyze the data from a Scoping Assessment

Responses from quantitative questions can be calculated into percentages. Calculating these figures will show where women and men are represented (and are not) within business operations. The following table is a sample template for analyzing the Scoping Assessment's quantitative results.

	Percentage of women★	Percentage of men
Employees		
Managers		
Employees hired in the last 12 months★★		
Employees promoted in the last 12 months		
Customers reached in the last 12 months		
Suppliers purchased from in the last 12 months		
Board members		
Internal committee member chairs		

> ★ To calculate the percentage of women, divide the number of women employees by the sum total of women and men employees.

> ★★ It can also be informative to calculate the percentage of women hired out of total women employees (# women hired divided by total women employees), and comparing with the percentage of men hired out of total men employees. This calculation can also be completed for promotions.

For calculations, percentages that are roughly gender balanced (i.e. 50% women and 50% men) indicate greater gender equality. For questions that involve a "yes/no" answer, "yes" responses usually indicate more gender equitable business practices. It is important to contextualize responses. Depending on the business environment and social norms, positive responses may not necessarily indicate more gender equitable practices.

Certain questions are included to simply learn more about the business itself. Questions like company sector, types of customers and suppliers are important pieces of information. These insights into the company's operations will be used extensively in the Full Assessment and subsequent GEM steps.

How to assess the company's performance on GEM based on data analysis

Using the analyzed data, the facilitator focuses on assessing the companies using the three criteria outlined below. Companies who fulfill these criteria can qualify for the Full Assessment.

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1 **Responsiveness**
Did the company respond to the facilitator's request in a timely and professional manner? Did the company provide the requested data following the RA meeting, if applicable?

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2 **Data availability**
Was the company able to answer most of the questions, including quantitative questions? Were there a limited number of responses recorded as "not applicable" or "refuse to answer"?

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3 **Impact potential**
Did the responses indicate several areas to improve gender equality in business operations? Are there company practices and policies that would benefit from further research?

How to assess a company's impact potential

Within the ESG categories, the capacity builder administering the assessment pays attention to:

- Low levels of women or men's representation indicated in the percentage analysis

- "No" responses

- Responses indicating that business practices and policies are not differentiated for women and men

Analyzing the impact potential of ESG categories reveals gaps in the company's GEM performance. These gaps highlight potential areas to improve business performance and gender equality outcomes.

In other words, it is less important to identify "top performers" in GEM (e.g. 50% managers are women, an environmental policy that takes the different impacts on women and men stakeholders into consideration, etc.) than to identify priority areas for upgrading GEM performance. All companies – whether top performers or those that are currently weak – can improve, and the ultimate purpose of the GEM Framework is to promote and support such improvements.

Priority areas that are identified can be further investigated in the next stage of the GEM process.

Step 3
Full Assessment

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
IDENTIFICATION	SCOPING ASSESSMENT	FULL ASSESSMENT	STRATEGY DEVELOPMENT	IMPLEMENTATION MONITORING & LEARNING	IMPACT MEASUREMENT

Conduct an in-depth assessment of company capacity and performance in gender equality mainstreaming and identify opportunities for improvement.

Once a company has completed the Scoping Assessment, the next step is to conduct a Full Assessment to gain a richer understanding of a company's gender performance and capabilities. At the end of this second assessment, the company will receive a customized report with recommended GEM strategies that form the basis of a more in-depth strategy development process outlined in Step 4.

What is the Full Assessment?

The Full Assessment provides a deeper view into a company's current performance and capabilities in gender equality mainstreaming across ESG areas. This assessment, which mainly uses qualitative open-ended questions, is more robust than the Scoping Assessment described above in Step 2. Through facilitated discussion, this assessment aims to uncover underlying opportunities and barriers to achieving greater gender equality in business practices and policies.

- Guidance Tool: Facilitating a Full Assessment
- Communication Tool: Setting up an Assessment
- Communication Tool: Assessment Schedule
- Communication Tool: Assessment Data Brief
- Interview Tool: Full Assessment
- Interview Tool: Focus Group Discussion
- Guidance Tool: Facilitator Observations
- Guidance Tool: GEM Report Preparation

What can the Full Assessment be used for?

- **Investors** and **capacity builders** can use the Full Assessment to explore and develop GEM strategies for companies to improve gender equality and business performance. These strategies align with ESG criteria and are linked to business priorities, and are summarized in a 'GEM Report' prepared for the company. The GEM Report plays an important role in the next step – Step 4 – Strategy Development.

- **Investors** can also use the Full Assessment in due diligence procedures to analyze gender performance and develop gendered ESG action plans (i.e. GEM Report) for investment prospects.

- **Capacity builders** can embed the Full Assessment into existing client services to strengthen gender and business offerings to clients through the development of custom action plans (i.e. GEM Report).

Who can conduct a Full Assessment?

Similar to the Scoping Assessment in Step 2, it is recommended that a capacity builder with gender, ESG and business experience conduct the Full Assessment. Given that the assessment collects a range of information and seeks to understand employee and manager opinions, assessments conducted by a third party are less likely to be skewed by gender and other biases. Additionally, a third party can more easily interpret company responses and perceive patterns which reinforce negative gender dynamics. It is ideal for the capacity builder to have a team of facilitators that includes women and men.

Self-Guided Company

A company may decide to complete GEM independently. The GEM online self-assessment is a tool designed specifically for companies doing the assessment themselves. It is longer in length than the Scoping Assessment but much shorter than the Full Assessment. Companies who complete the online self-assessment receive a score and recommendations on how to improve GEM for each ESG standard. It can be accessed at https://www.meda.org/self-assessment.**.**

If after taking the online self-assessment a company wants to learn more about GEM, the Full Assessment is the best option. A company may complete the Full Assessment using a team of two to three women and men employees although an external capacity building organization is preferred. It is suggested that the team of employees be led by an experienced manager who is knowledgeable in diversity, inclusion, human resources and operations.

Guidance Tool: Facilitating a Full Assessment

Purpose	To prepare, conduct and complete a GEM Full Assessment with a company.
User	Capacity builder (preferred) or investor
Description	This tool provides guidance on how to conduct a Full Assessment with a company. It specifies who at the company responds, what to prepare beforehand, key areas to be aware of during interviews, an explanation of the associated tools, and next steps.

How to conduct the Full Assessment?

The Full Assessment is conducted in-person at the company's offices over approximately one and a half to two days. It is best to use a gender diverse team of at least two facilitators, including a local representative who understands the cultural context and language.

The Full Assessment uses a variety of methods to gather information including key informant interviews, focus group discussions, document review, and observation.

- Communication Tool: Assessment Data Brief
- Interview Tool: Full Assessment
- Interview Tool: Focus Group Discussion
- Guidance Tool: Facilitator Observations

Who responds to the Full Assessment?

Senior executives, mid-level managers and entry level employees can participate in the Full Assessment. It is suggested to reach employees from different job levels, departments, genders, tenures and ages. A strong Full Assessment would engage at least three members from the executive level (e.g. President, Chief Financial Officer and Chief of Operations), at least five middle managers (e.g. Human Resources Manager, Sales Manager, Procurement Manager, Finance Manager, Operations Manager, Logistics Manager, etc.) and more than fifteen lower level staff (e.g. Sales Representative, Technician, Customer Service Representative, Field Officer, Analyst, etc.).

What preparation is required before the Full Assessment?

1. Schedule a two-day period with the company for the assessment.

2. Review interview tools in Step 3 to determine priority areas on which to focus. The results and analysis from the Scoping Assessment also inform this review. For instance, answers from the Scoping Assessment can be transferred to the Full Assessment as the two assessments have some overlap.

3. It is best practice to ask the company to complete a data brief prior to the assessment. The data brief requests quantitative information upfront so that the assessment can be completed more efficiently and effectively. However, it should only be requested of companies that show a strong willingness to share data.

　　Communication Tool: Setting up an Assessment

　　Communication Tool: Assessment Schedule

　　Communication Tool: Assessment Data Brief

Guidelines for facilitators during the Full Assessment

There are four main methods used to collect information during the Full Assessment: key informant interviews, focus group discussions, document review and observation.

Method	Description	Examples of when to use
Key informant interview	The facilitator asks a set of questions to one or more respondents. The questions can stimulate discussion among the respondent(s) and facilitator.	Meetings with senior and mid-level management.
Focus group discussion	The facilitator speaks with a group of four to ten employees who are at the same job level. The facilitator uses a limited number of open-ended questions to stimulate discussion.	Meetings with junior and entry level staff.
Document review	The facilitator reviews company materials including policies, procedural manuals, marketing and training materials, employee handbook, organizational chart, etc.	Review documented company materials to gain another perspective on gender inclusion.
Observation	Through direct observation, the facilitator analyzes the overall company environment, culture and employee behaviour.	Observation can be used throughout the Full Assessment.

Meetings are recommended to be conducted in the preferred language of the respondent.

- It is suggested that some but not all questions are asked in the Full Assessment. The facilitator can pick and choose the questions most appropriate and informative for the company. This will depend on the company's awareness and interest in GEM, the time available for assessment, and relevance of the questions to the business.

- It is essential to start the Full Assessment with an introductory meeting with senior management. The purpose of this meeting is to set expectations and ensure there is leadership buy-in for the process. The 🔍 Interview Tool: Full Assessment includes questions that can help guide the introductory meeting.

The following opening script or something similar can be used to begin the meeting. This is a guidance only, and it is advised that you customize to your knowledge of the situation.

Introduction with senior management (first meeting)

> *[Organization Name] is here to support you in learning about your company. In particular, we are here to understand how women and men are involved in your business, and the different roles that they play at your company. This visit builds upon what you answered during the Scoping Assessment interview. It is important to emphasize that we are here to learn from YOU and your staff. We are not the experts on your company but bring technical expertise that can support the learning process. During the next two days, we will be observing, listening to your perspectives and opinions, and asking questions to gain a better understanding of your business. The purpose of our visit is not to criticize or spotlight poor performance but rather learn and uncover new opportunities for women (and men) to maximize their contributions to your business. For example, we would like to understand if your marketing strategy intentionally targets women (and men) in the selling of company products and services.*
>
> *You and your employees' feedback during this process will be collected, studied and summarized into a custom written "GEM Report." The GEM Report includes an analysis of results, copy of interview responses, and a list of strategic recommendations for how the company can improve its inclusion of women (and men) within business operations. You will receive the GEM Report within [number, e.g. 2] weeks of completing the Full Assessment. Once you have received the GEM report, you will have the opportunity to review the recommendations and decide if you would like to move forward to the next step of strategy development. During strategy development, we will work with your senior management team to create gender equality mainstreaming strategies that make the most sense for your business now. Investors are also welcome to participate in strategy development. [If applicable, explain additional detail on next steps such as technical assistance available to implement GEM strategies]*

The Full Assessment usually takes one and half to two days to complete. All of the responses you and your staff provide will be strictly CONFIDENTIAL. Only aggregate results will be included in the GEM Report. Do you have any questions or comments at this point? We thank you in advance for your participation. Please let us know of any requirements or requests you may have during our visit.

Review the Full Assessment agenda and confirm the plan with senior managers. Make adjustments to the schedule as needed.

[Proceed to ask questions 🖎 Interview Tool: Full Assessment*]*

- Start each employee interview, document review and focus group discussion with an introduction such as the following sample script before proceeding with assessment questions.

Introduction with participating staff (e.g. mid-level managers, entry level staff)

[Company name] has agreed to participate in a process to uncover new business opportunities for engaging women and men in company operations. As such, [Facilitating organization] is here to learn more about [company name]. We are seeking to understand how women and men are involved in [company name], and the different roles that they play within the company.

Over the course of two days, we are speaking with employees from different levels of the company including your team in [department]. During this meeting, we would like to learn more about your specific role and personal experiences at the company. It is important to emphasize that we are here to learn from YOU. We are not the experts. We value your candid and honest opinions.

All responses you provide are strictly CONFIDENTIAL. Do you have any questions or comments at this point? We thank you for your participation.

- When asking respondents questions, do not pressure them to answer if they refuse or do not have the needed data.

- It may be helpful to use the table below to record frequently repeated answers. The facilitator can fill in the interview tools using the suggested acronyms where appropriate. Note that it would be unusual for a company to answer all questions, but at the same time, it is important to be as thorough as possible.

Acronym	Description	Definition / standard response
N/A	Not Applicable	The question was asked and the respondent answered that the question is not relevant to their business.
NM	Not Measured	The respondent does not track this information.
RA	Refuse to Answer	The respondent deflected or refused to answer the question.
NAs	Not Asked	The question was not asked because the facilitator determined that it was not relevant, there was insufficient time, etc.

What is included in the Full Assessment?

The Full Assessment is made up of five parts, each with its own set of questions.

Part I: Identification

These questions are filled out by the facilitator directly. Part I is used to connect results with the Scoping Assessment and record information about the Full Assessment's methodology.

Part II: Introduction to gender

Discussion questions in Part II are used at the very beginning of the Full Assessment during the introductory meeting with senior management. They are an important action to "warm up" the company to gender and gender equality concepts. Since gender equality can be a new or sensitive topic, it may be threatening to some managers. The discussion questions are designed to establish a shared understanding of gender equality and articulate that gender is a business opportunity. Offering your (the facilitator's) own perspective can foster dialogue. It can also be helpful to mention that there are no right or wrong answers.

If the facilitator has not already done so, use this time to set expectations for the assessment and time-line, and respond to questions about the purpose and use of information obtained during the assessment.

Responses from Part II provide a valuable baseline of management's awareness and experience in GEM. This baseline critically informs the types of questions appropriate to ask the company, especially in Part IV. For example, the facilitator would not ask advanced level questions with a company that has low gender awareness.

Part III: Business strategy

The purpose of the discussion questions in Part III is to understand company strategy and priorities. After this discussion, the facilitator will have a strong sense of where the business is going and its key challenges. This is a crucial section for the formulation of gender strategies in Step 4 – Strategy Development. GEM strategies must closely align with business priorities so that companies are incentivized to pursue them.

Part IV: Gender Equality Mainstreaming (GEM) full profile

This is by far the largest section of the Full Assessment. It is similar in structure to the GEM Profile in the Scoping Assessment, where questions are organized by social, governance and environmental criteria. Each question measures an aspect of the company's ability to mainstream gender in business practices and policies. The GEM Full Profile is designed with the following characteristics:

- The facilitator chooses the questions that are most relevant to the company, appropriate to management's interest and knowledge in GEM, and reasonable given the time allowed. Companies with low awareness of gender can be asked fewer and less advanced questions.

   The GEM full profile offers a "menu" of questions. Not all questions are asked.

- Many questions overlap because there is often more than one way to obtain an answer. As a result, some answers can be inferred by responses to other questions.

- All questions, including quantitative, are discussion based. For instance, when a respondent provides a numeric answer, request that they expand further. The context of the response is just as important as the number itself.

- A variety of methods not limited to key informant interviews, focus group discussions, document reviews and observation can be used to collect information.

- Assessment questions are classified into two levels. If the answer to the first-level question is "no," then skip to the next first-level question. If the answer to the first-level question is "yes," then proceed to ask the second-level question.

Level 1	Does the company have an employee handbook?	
Level 2		Does the employee handbook take gender into consideration?

- Advanced questions can provide valuable data for developing more strategic and targeted GEM strategies in Step 4 – Strategy Development. They can be asked if the company has been receptive to questions asked up to that point, shows an understanding of GEM, has strong data management systems, and is open to sharing company information.

Overall, the facilitator uses their best judgment to determine the appropriate questions to ask given the company's interest and familiarity with GEM. It may be helpful for facilitators to reflect on the data collected to date, particularly from the Scoping Assessment. The GEM spectrum described in the 📖 Guidance Tool: GEM Report Preparation may also be helpful.

Part V: Financial profile

This optional section collects data that is mostly found in a company's financial statements. Tracking these metrics establishes a financial baseline for companies, which can be useful for businesses that are implementing GEM strategies in subsequent steps of the framework. Companies will likely be reluctant to disclose financial information unless you are an investor or associated with one.

What is completed after the Full Assessment?

- After conducting the key informant interviews, focus group discussions, document reviews, and observation at the company offices, the facilitator records all staff responses and data in the tools.

    Interview Tool: Full Assessment

    Interview Tool: Focus Group Discussion

- Through discussion, the facilitator (without the company) reflects on the Full Assessment process and how it went.

    Guidance Tool: Facilitator Observations

- Guidance Tool: The facilitator analyzes results, generates strategies and presents them in an organized GEM Report, which is submitted to companies in Step 4 – Strategy Development.

    Guidance Tool: GEM Report Preparation
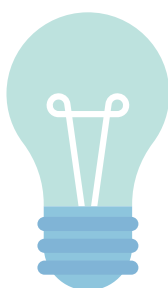
Tips for effective facilitation

- Ask questions in an open manner. Do not add your own opinion to the question as this can limit and bias responses, as well as take up valuable time.
- The respondent may not be able to answer certain questions during the meeting because they need to search for the data. Make a note of these questions as they arise. At the end of the meeting, summarize these questions for the respondent and set a deadline for them to submit the answers as data is available.
- During one-on-one interviews and focus group discussions (FGDs), ensure that it is conducted in a safe and private space. No managers are present when conducting a FGD with staff. Ideally a conversation with an employee would not take place in their manager's office, even if the manager is not present.

- FGDs are a helpful way to identify knowledgeable or unusual staff to conduct an additional one-on-one interview with to gain further information.
- During document reviews, be sensitive to the company's willingness to share information. They will likely want to be present while you review the policies.
- Consult additional resources, such as MEDA's Market Research for Value Chain Initiatives

Communication Tool: Setting up an Assessment

Purpose	To set up a two-day Full Assessment with the company. The communication tools in Step 3 – Full Assessment are used to set expectations with the company about the meeting format, desired staff participants, and their anticipated time commitment.
User	Capacity builder (preferred) or investor
Description	This tool includes a sample email template to prepare companies for a Full Assessment. The proposed schedule and the data brief (if applicable) are included as attachments.

This email is for illustrative purposes only. Communications with companies are modified based on the context. Resourcing, partnerships and other key areas will influence the messaging to companies. |

Dear [company manager],

Thank you for your participation in the gender equality mainstreaming Scoping Assessment. [Capacity building organization] is pleased to invite you to participate in the next stage!

The next stage is the Full Assessment, which involves an in-person visit to your company offices to further explore how women and men contribute to your business operations. This visit builds upon responses you provided during the Scoping Assessment. During the visit, [number] consultants will meet with managers and employees from a variety of job levels and departments. The visit will take approximately two days. Please find proposed schedule and meeting agendas attached. We welcome your feedback on the suggested employees, and meeting agenda and times. Let us know if you would like to schedule a call to discuss further.

[If appropriate: In addition to the proposed Full Assessment schedule, please find the attached data brief. This document summarizes the quantitative data we are seeking from you at this stage. We would greatly appreciate if you could prepare this data and submit it to us in advance of the company visit. We are available by phone to discuss any questions you have regarding the data brief.]

We look forward to your participation in this next stage of the gender equality mainstreaming initiative. Please let us know if you have any questions.

Communication Tool: Assessment Schedule

Purpose	Proposed two-day Full Assessment schedule to share with the company. The communication tools in Step 3 – Full Assessment are used to set expectations with the company about the meeting format, desired staff participants, and their anticipated time commitment.
User	Capacity builder (preferred) or investor
Description	This tool provides a suggested two-day schedule to use as part of organizing a Full Assessment with the company.

Objective:	Conduct meetings with key staff to learn about women and men's roles at [company name] using the Gender Equality Mainstreaming Framework.
Location:	[office address]
Date:	[date]

STEP 3: FULL ASSESSMENT

Day 1 – [date]		
Time	**Person(s) involved**	**Agenda**
9:30-10:30	CEO, COO and HR Manager	▪ Introductions ▪ Overview of Full Assessment agenda ▪ Introduction to gender
10:30-11:30	COO	▪ Company overview and objectives ▪ Discussion on employees, customers and suppliers ▪ Environment and other stakeholders
11:30-12:00	CEO	▪ Board governance ▪ Business strategy and priorities
12.00-12:30	Meet managers responsible for product development	Discussion on customers and product development
12:30-13:00	Meet managers responsible for sales and marketing	Discussion on customers and marketing strategy
13:00-14:00	Break	
14:00-14:30	Meet procurement manager	Discussion on suppliers
14:30-17:00	Meet managers responsible for human resources	▪ Discussion on employees including recruitment, promotion and retention ▪ Discussion of company policies and HR practices

Day 2 – [date]		
Time	**Person(s) involved**	**Agenda**
9:00-10:30	Meet with 4-10 women and men sales representatives	Learn about staff roles and experience working at company
10:30-11:00	Meet with CFO	Learn about financial management and compliance
11:00-12:30	Meet with 4-10 customer service women and men representatives	Learn about staff roles and experience working at company
12:30-13:30	Break	
13:30-14:30	Open time for ad hoc meetings	Review any remaining questions
14:30-16:00	Meet with 4-10 newly hired employees	Learn about new staff to discuss their motivation to join the company and their expectations
16:00-17:00	Main company contact for Full Assessment visit	Full Assessment wrap-up and next steps

Communication Tool: Assessment Data Brief

Purpose	An optional tool shared with a company to collect quantitative information before an in-person Full Assessment.
User	Capacity builder (preferred) or investor
Description	The Full Assessment data brief tool requests quantitative company information, as well the documents requested to be reviewed during the assessment, such as company policies and marketing materials. Obtaining this data beforehand improves the effectiveness and efficiency of the assessment. The tool also allows companies to become familiar with the assessment content and identify the most suitable staff to respond. Although the data brief is extremely useful, it is not recommended for companies who show a resistance to sharing their data. The tool may be overwhelming to these companies and potentially lead them to drop out of the GEM process. If the company demonstrates an openness to data sharing, this tool can be sent at least two weeks before the scheduled date of assessment.

Dear [company manager],

The following data is requested in advance of the in-person Full Assessment. Please note, this data is preferred but not required. Please leave questions blank where data is not available or is time consuming to calculate.

Quantitative data

Social
Employees

Number of women senior managers (Senior managers are at the executive leadership / C-Suite level)	
Number of men senior managers	
Number of full time women employees	
Number of full time men employees	
Number of part time women employees	
Number of part time men employees	
Number of women employees who exited the company in the last 12 months	

Number of men employees who exited the company in the last 12 months	
Breakdown of number of women and men employees in each company department	
Breakdown of number of women and men employees at each job level	
Annual employee turnover of women employees	
Annual employee turnover of men employees	
Number of women employees participated in training or professional development programs in the last 12 months	
Number of men employees participated in training or professional development programs in the last 12 months	
Ratio of the average salary paid to women employees compared to men employees, excluding management level staff *Non-Manager Wage Equity Ratio = W1 / M1* *W1 = [sum of salaries paid to women non-management employees] / total number of women non-management employees* *M1 = [sum of salaries paid to men non-management employees] / total number of men non-management employees*	
Ratio of the average salary paid to women managers compared to men managers *Manager Wage Equity Ratio = W1 / M1* *W1 = [sum of salaries paid to women managers] / total number of women managers* *M1 = [sum of salaries paid to men managers] / total number of men managers*	
Percentage of the company's top 10% compensated employees who are women	
Number of occupational injuries for women employees in the last five years	
Number of occupational injuries for men employees in the last five years	
Number of occupational fatalities for women employees in the last five years	
Number of occupational fatalities for men employees in the last five years	
Number of women employees working on the company's product and services development team	
Number of men employees working on the company's product and services development team	
Number of women employees working on the company's product and services delivery or distribution team	
Number of men employees working on the company's product and services delivery or distribution team	
Number of women trained to serve the gender-specific needs of customers	

Number of men trained to serve the gender-specific needs of customers	
Number of women employees working on the company's promotional strategy and materials for company products and services	
Number of men employees working on the company's promotional strategy and materials for company products and services	
Number of women employees working in the company's procurement department	
Number of men employees working in the company's procurement department	
Customers and sales	
Total annual sales generated from women customers	
Total annual sales generated from women customers	
Average profit margin generated from women-specific products and services	
Average profit margin generated from men-specific products and services	
Percentage of repeat women customers	
Percentage of repeat men customers	
Average annual sales generated by a woman employee *[sum of sales earned by women employees] / total number of women employees*	
Average annual sales generated by a man employee *[sum of sales earned by men employees] / total number of men employees*	
Suppliers	
For companies that procure from individual or small businesses, number of suppliers who are women or businesses owned/managed by a woman in the last 12 months	
For companies that procure from individual or small businesses, number of suppliers who are men or businesses owned/managed by a man in the last 12 months	
For companies that procure from large or multinational companies, number of suppliers that take gender into consideration? (e.g. suppliers with a gender equality strategy, commitment, etc.)	
For companies that procure from large or multinational companies, total number of number of suppliers	

Governance

Percentage of women ownership in the company	
Percentage of men ownership in the company	
Percentage of institutional ownership in the company	
Percentage of institutional owners that have a mandate in or specific requirements for gender equality?	
Number of women participating on each internal committee	
Number of men participating on each internal committee	

Environment

Number of women employees that received environmental training in the last 12 months	
Number of men employees that received environmental training in the last 12 months	
Number of green products and services sold to women customers in the last 12 months	
Number of green products and services sold to men customers in the last 12 months	
Number of women suppliers the company sourced from that implement environmental business practices in the last 12 months	
Number of men suppliers the company sourced from that implement environmental business practices in the last 12 months	
Number of women employees that are a member of the company's 'green team' or environmental committee	
Number of men employees that are a member of the company's 'green team' or environmental committee	

In preparation for the Full Assessment, we would like to view the following documents, if available. Please note, we respect company confidentiality at all times throughout the assessment.

Policies and procedures

Human Resources Policy / Employee Handbook, which may include the following policies or the following may be separate policies:

☐ Anti-discrimination

☐ Child labour

☐ Fair compensation

☐ Fair hiring

☐ Flexible working hours/telecommuting

☐ Grievance procedures

☐ Parental leave

☐ Recruitment

☐ Return to work

☐ Sexual harassment

☐ Staff professional development

☐ Whistle blower / employee feedback system

☐ Company code of ethics

☐ Community service policy

☐ Conflict of interest

☐ Client protection policy

☐ Data security and privacy

☐ Environmental management system

☐ Environmental policy (i.e. energy conservation, waste reduction, water conservation)

☐ Gender policy

☐ Procurement policy

☐ Risk management policy

☐ Staff security policy

☐ Worker health and safety policy

Training materials

Any training materials provided to staff, particularly women, such as:

☐ Employee orientation

☐ Professional development materials

☐ Topic specific training (i.e. sales manager training, financial management, environmental sustainability, etc.)

Promotional materials

Any brochures, advertisements, posters, websites, etc. used by the company to market products and services to customers.

Organizational chart

Interview Tool: Full Assessment

Purpose	This is one of two interview tools used to collect information during a two-day Full Assessment at the company offices. It is the primary data collection tool used in meetings with senior and mid-level manager group and individual meetings.
User	Capacity builder (preferred) or investor
Description	This tool contains questions to stimulate discussion among company respondents. It's important to note that the facilitator may already have collected some of this information from the Scoping Assessment. If so, complete the tool with the information gathered and do not repeat questions that the respondents have already taken time to answer. The facilitator may choose to repeat this information back to respondents as they move on to new questions.
	Part I is completed by the facilitator alone. Part II and Part III can be completed during the introductory meeting with senior management. Part IV is an in-depth GEM profile organized by ESG area. It begins with the social area of ESG because it is usually the easiest for companies to respond to. Staff respondents at different levels of the company provide data for Part IV. Lastly, Part V is an optional section to collect financial information about the company.

Part I: Identification

Company name
Key contact person's name and job title
List of respondents and their respective job titles
Date(s) of Full Assessment
Name of interviewer

Part II: Introduction to gender

1.	What first comes to mind when we talk about gender?
2.	What do you think gender equality means?
3.	Have you considered how women and men may be impacted by the company in different ways?
4.	Have you considered how women and men may have different needs which influence their role and level of engagement with the company? (e.g. women and men customers; managers; junior staff, women and men entrepreneur suppliers; etc.)
5.	Does the company perceive gender as a business opportunity?, If so, in what ways? If not, why?
6.	Has the company implemented any gender specific initiatives in the past?
7.	Is the company considering implementing gender specific initiatives in the future?

Part III: Business strategy

1. Where do you see the company in the next few years? (e.g. company vision for the future in terms of business and impact objectives)

2. What are the main strategic goals for the company?

3. What are the critical success factors to achieving those goals?

4. What are the most significant barriers to achieving those goals?

5. What are the main challenges in your industry and how do you address these challenges?

6. What are the top key performance indicators the company uses to track business performance?

Part IV: GEM full profile

Social
Employees: Representation
1.   How many of the company's senior management are women? (Senior managers are at the executive leadership / C-Suite level)
2.   How many of the company's senior management are men? (Senior managers are at the executive leadership / C-Suite level)
3.   How many full time employees are women? (Full time employees typically work 35-50 hours a week, depending on the standard of the country)
4.   How many full time employees are men? (Full time employees typically work 35-50 hours a week, depending on the standard of the country)
5.   How many part time employees are women? (Part time employees typically work less than 35 hours a week, depending on the standard of the country)
6.   How many part time employees are men? (Part time employees typically work less than 35 hours a week, depending on the standard of the country)
7.   How many women employees exited the company in the last 12 months? Clarify how exits are defined by the company (voluntary or involuntary termination or both)
8.   How many men employees exited the company in the last 12 months? Clarify how exits are defined by the company (voluntary or involuntary termination or both)
9.   Are there staff roles that are predominantly filled by women? Why?
10. Are there staff roles that are predominantly filled by men? Why?
Employees: Representation – advanced questions
11. Provide a breakdown of the number of women and men employees in each department of the company

11a. For departments that have low levels of women or low levels of men employees, provide gender disaggregated data for the number of applicants, applicants shortlisted, individuals hired, and employees retained after probation period within each department. (Gender disaggregated data is data on individuals broken down by women and men)

12. Provide a breakdown of the number of women and men employees at each job level of the company

12a. For job levels that have low levels of women or low levels of men employees, provide gender disaggregated data for the number of applicants, applicants shortlisted, individuals hired, and employees retained after probation period within each job level

13. What is the annual employee turnover of women employees?
Turnover = [# women employees leaving the company / total # women employees] X 100
(Clarify whether the retention rate is for voluntary exits or all terminated employees)

13a. Does the turnover of women employees vary at different job levels and departments of the company?

14. What is the annual employee turnover of men employees?
Turnover = [# men employees leaving the company / total # men employees] X 100

14a. Does the turnover of men employees vary at different job levels and departments of the company?

15. What is the percentage of women employees promoted by each manager in the last 12 months?
Percentage of women promoted = [total # women employees promoted by manager / total employees promoted by manager] X 100

16. What is the percentage of men employees promoted by each manager in the last 12 months?
Percentage of men promoted = [total # men employees promoted by manager / total employees promoted by manager] X 100

Employees: Practices

17. What is the process and procedure for recruiting and hiring new employees?

18. Where does the company advertise job opportunities?

19. Does the company target recruitment from specific areas, training institutes, colleges or universities?

19a. Does the targeted recruitment benefit women and men candidates?

20.	Are there instances where the company has a preference to hire women or men employees? Please explain
21.	How is a hiring decision made? Who is involved?
22.	Does the company have strategies in place to prevent unconscious bias in recruitment and hiring decisions? (e.g. software program that conceals the applicant's names on their resume/CV, standardized structured interviews, etc.)
23.	Does the company have an employee handbook?
	23a. Does the employee handbook take gender into consideration?
24.	Does the company have a procedure for orienting new employee hires?
	24a. Does the orientation procedure take gender into consideration?
25.	What types of employee training and development programs are offered by the company, including gender-focused programs?
	25a. How many women employees participated in training or professional development programs in the last 12 months?
	25b. How many men employees participated in training or professional development programs in the last 12 months?
	25c. Do company training materials use gender inclusive language, pictures, graphics, etc.?
	25d. Are employee training and development programs delivered by trainers with experience in gender, diversity or inclusion?
26.	Does the company offer mentorship opportunities for women and men employees?
27.	Are there differences in the level of knowledge and use of technology between women and men employees?
28.	How is employee performance evaluated?

28a. What are the key performance indicators (KPIs) for employee performance? Do any KPIs encourage employees to target or include women and men (e.g. serving women and men customers, collaboration across gender diverse teams)?

28b. Does the company analyze the average performance achieved by women employees? By men employees?

29. What is the process and procedure for promoting employees?

30. How is a promotion decision made? Who is involved?

31. Are there instances where the company has a preference to promote women or men employees? Please explain

32. Does the company have strategies in place to prevent unconscious bias in promotion decisions? (e.g. internal job postings, standardized employee performance metrics, competency guidelines for promotions)

33. Does the company have an established employee feedback system?

33a. Does the employee feedback system encourage participation from both women and men employees?

33b. Is the employee feedback system used by both women and men employees?

34. Are there documented grievance procedures for women and men employees to address issues such as sexual harassment and discrimination?

34a. Do grievance procedures ensure privacy and safety of the employee?

34b. Are grievance procedures used by both women and men employees?

35. Does the company provide health insurance to both women and men employees?

35a. Do all women and men employees have access to the health insurance plan? (e.g. full-time, part-time, job level)

35b. What is covered for employees under the health insurance plan?

36. Does the company offer a 'return to work program' for women and men who take parental leave?

37. Does the company provide child care benefits or services for employees?

38. Does the company offer flexible work arrangements for employees? (e.g. adjusting start and end times of the work day)

39. Does the company offer telecommuting options for its employees? (e.g. working from home)

40. Does the company offer other flexible options or benefits for women and men employees?

41. Does the company conduct an annual employee satisfaction survey?

41a. Does the company analyze survey responses by women and men separately?

41b. Does the company use a third-party organization to administer the satisfaction survey?

42. Does the company regularly conduct market compensation studies?

42a. Does the company analyze compensation by women and men to evaluate pay equity?

42b. Does the company use a third-party organization to administer the market compensation study?

43. Does the company conduct exit interviews?

43a. What are the main reasons for women employees leaving the company?

43b. What are the main reasons for men employees leaving the company?

Employees: Practices – advanced questions
44. What is the ratio of the average salary paid to women employees compared to men employees, excluding management level staff? *Non-Manager Wage Equity Ratio = W1 / M1* *W1 = [sum of salaries paid to women non-management employees] /* *total number of women non-management employees* *M1 = [sum of salaries paid to men non-management employees] /* *total number of men non-management employees*
45. What is the ratio of the average salary paid to women managers compared to men managers? *Manager Wage Equity Ratio = W1 / M1* *W1 = [sum of salaries paid to women managers] / total number of women managers* *M1 = [sum of salaries paid to men managers] / total number of men managers*
46. What percentage of the company's top 10% compensated employees are women?
47. Are staff aware of the particular barriers that women and men employees face in the workforce? Please explain (e.g. elder and childcare responsibilities, long commuting distances, cultural expectations, etc.)
48. Are there local customs or traditions that restrict women or men from participating more in the workplace?
49. Does the company track the number of occupational injuries and fatalities?
49a. What was the number of occupational injuries for women and men employees in the last five years?
49b. What was the number of occupational fatalities for women and men employees in the last five years?

Employees: Strategy
50. Does the company have a strategy to recruit and hire more women or men employees?
51. Does the company have a strategy to promote more women or men employees?
52. Does the company allocate specific resources to increase and retain women or men employees?

Customers & sales: Practices (business to consumer (B2C) companies only)
53. Does the company target consumers? If yes, proceed with questions. If no, skip this section and go to "Customer & sales: Practices (business to business (B2B) companies only" – Question 68
54. What is the company's primary target market? (e.g. target customer profile)
55. Is the company's target market differentiated by women and men?
56. Are women or men more likely to know about the company and its products and services?
57. What is the company's product or service value proposition to customers? (e.g. product, selling features, price, convenience, quality, etc.)
58. Is the company's value proposition differentiated for women and men customers?
58a. Does the company have different pricing strategies for women and men customers? Does the pricing strategy encourage women and men customers to purchase its products and services?
58b. Does the company have incentive systems to motivate staff to reach women and men customers?
58c. Are the company's promotional strategies differentiated to target women and men customers? (e.g. messaging and medium - print, TV, online advertisements, etc.)
59. How many women and men employees work on the company's product and services development team?
60. Has the company consulted women and men outside the company (e.g. potential customers) in the development of new products and services?
61. Are the company's methods of product and service delivery accessible by women and men customers? (e.g. where is the product sold? At what time of day is the product sold? Does it require access and knowledge of technology? Is the location and time convenient for women and men?)
62. How many women and men employees work on the company team that delivers products and services to customers?
63. Are employees trained to serve the gender-specific needs of women and men customers? (e.g. adapting language; awareness of the specific and different needs of women and men customers)

	63a. How many women and men employees are trained to serve the gender-specific needs of customers?
64.	How many women and men employees work on the company team that develops promotional strategy and materials for company products and services?
65.	Does the company measure the quality of its work with customers and analyze results by women and men?
66.	Does the company track customer complaints and analyze complaints by women and men customers?

Customers & sales: Practices (business to business (B2B) companies only) Note, depending on the sector and context, these questions may be difficult for B2B companies to answer.

67.	Does the company target other businesses as its customers? If yes, proceed with questions. If no, skip this section and go back to "Customers & sales: Practices (business to consumer (B2C) companies only)" or proceed to "Customers & sales: Practices – advanced questions"
68.	What is the company's product or service to business customers? (e.g. product, selling features, price, convenience, quality, etc.)
69.	What type of business customers does the company target? (e.g. sector and size of business customers)
70.	Are the company's target business customers managed by women and/or men?
71.	Does the company track or have a general idea of the number of its business customers that are managed by women and/or men?
72.	Who is more likely to know about the company and its products and services? Women or men business customers?
73.	Is the company's product or service value proposition differentiated for women or men business customers?
	73a. Does the company have different pricing strategies for women and men business customers? Does the pricing strategy encourage women and men business customers to purchase its products and services?
	73b. Are the company's methods of product and service delivery accessible by women and men business customers? (e.g. where is the product sold? At what time of day is the product sold? Does it require access and knowledge of technology? Is the location and time convenient for women and men?)

	73c. How many employees are trained to serve the gender-specific needs of women and men business customers? (e.g. adapting language; awareness of the specific and different needs of men and women customers)
	73d. Does the company have incentive systems to motivate staff to reach women and men business customers?
	73e. Are the company's promotional strategies differentiated to target women and men business customers? (e.g. messaging and medium - print, TV, online advertisements, etc.)
	73f. Does the company measure the quality of its work with business customers and analyze results by women and men?
	73g. Does the company track customer complaints and complaints by women and men business customers?
	73h. How many women and men employees work on the company's product and services development team, if applicable?
	73i. Has the company consulted women and men outside the company (e.g. potential business customers) in the development of new products and services?
	73j. How many women and men employees work on the company team that delivers products and services to business customers?
	73k. How many women and men employees work on the company team that develops promotional strategy and materials for company products and services?

Customers & sales: Practices - advanced questions

74.	If the company tracks women and men customer data separately:
	74a. What are the total sales generated from women customers; from men customers?
	74b. What are the profit margins generated from women customers; from men customers?
	74c. How does the company define 'repeat customers'?
	74d. What is the percentage of repeat women customers?

	74e. What is the percentage of repeat men customers?
	74f. What is the average annual sales generated by a woman employee? *[sum of sales earned by women employees] / total number of women employees*
	74g. What is the average annual sales generated by a man employee? *[sum of sales earned by men employees] / total number of men employees*
	74h. For the company's customer KPI, is there a differentiation in performance between women and men customers? (e.g. portfolio at risk for financial services companies)
	74i. Is the company's income from women customers sufficient to cover its costs and generate profits?
	74j. Is the company's income from men customers sufficient to cover its costs and generate profits?

Customers & sales: Strategy

75.	Do women-specific and men-specific products and services have priority within the company? Is this reflected at the strategic level?
76.	Does the company have a strategy to increase the number of women or men customers?
77.	Does the company allocate specific resources to increase and retain women or men customers?
78.	Does the company receive any subsidies or project funds to support its work with women or men customers?

Suppliers: Individual and small business suppliers

79.	Does the company purchase goods and services from individuals and small business suppliers? If yes, proceed with questions. If no, skip this section and go to "Suppliers: Large and multinational suppliers"
80.	Does the company track the number of women and men suppliers including businesses owned/managed by women or men?
	80a. How many of the company's suppliers were women or businesses owned/managed by women in the last 12 months? (Company estimate is acceptable)
	80b. How many of the company's suppliers were men or businesses owned/managed by men in the last 12 months? (Company estimate is acceptable)

80c. Are employees aware of the particular opportunities and barriers that women suppliers face? (e.g. access and knowledge of technology, challenges meeting large orders, limited cash flow, etc.)

80d. Are employees aware of the particular opportunities and barriers that men suppliers face?

80e. Does the performance or quality of the products or services provided by women and men suppliers differ?

81. Does the company provide any value-added services to suppliers? (e.g. attractive payment terms, supply chain finance, job skills training, etc.)

81a. Do the company's services provided take into consideration the different needs of women and men suppliers?

81b. Do the company's services positively impact women and men suppliers?

82. Does the company have a strategy to increase the number of women or men suppliers?

83. Does the company actively seek to diversify suppliers by sourcing from women and men suppliers?

84. How many women and men employees work in the company's procurement department?

Suppliers: Large and multinational suppliers

85. Does the company purchase goods and services from large and multinational suppliers? If yes, proceed with questions. If no, skip this section and go back to "Suppliers: Individual and small business suppliers" or proceed "Community"

86. Do company suppliers take gender into consideration? (e.g. multinational supplier is committed to gender equality in its workforce; large business supplier has certification like WEConnect International demonstrating commitment to sourcing from women-owned enterprises, etc.)

86a. Does the company track the number of suppliers that take gender into consideration?

86b. Does the company actively seek to source from suppliers that prioritize gender equality?

87. How many women and men employees work in the company's procurement department?

Community
88.   Does the company have any specific objectives to benefit society? (e.g. community development, employment generation for low-income workers, access to education, etc.)
88a. To what extent have women contributed to the development of company social objectives? (e.g. women as managers, non-management level staff and individuals outside the company?)
88b. To what extent have men contributed to the development of company social objectives? (e.g. men as managers, non-management level staff and individuals outside the company?
88c. How do women stakeholders (e.g. employees, community members, suppliers, etc.) benefit from the company's social objectives?
88d. How do men stakeholders (e.g. employees, community members, suppliers, etc.) benefit from the company's social objectives?
89.   Does the company have a community engagement strategy?
89a. Does the community engagement strategy specify how to interact with women and men in the community?

Governance

Leadership and ownership structure
90.   How are directors of the board appointed?
91.   Is the Chair of the board held by a woman?
92.   In the last five years, was the Chair of the board held by a woman for more than a year?
93.   What is the longest term held by a woman director who is currently on the board?
94.   Is the board working towards (or maintaining, in the case of those already gender-balanced) achieving a roughly equal number of women and men directors on the board?
94a. Is there a board director and chair succession plan in place that promotes gender diversity?

95.	Does the company report gender disaggregated data to the board? (e.g. employees, managers, customers by women and men)
96.	What is the percentage of women ownership in the company?
97.	What is the percentage of men ownership in the company?
98.	What is the percentage of institutional ownership in the company?
	98a. Do the institutional shareholders have a mandate in or specific requirements for gender equality?
99.	Does the board or shareholders prioritize women in company objectives or decisions?
100.	In the last five years, was the CEO (or equivalent) position held by a woman for more than one year?
101.	Is there a succession plan in place for each member of the senior management team that promotes gender diversity?
102.	If the company has internal committees, how many women and men sit on each committee?
	102a. To what extent do women and men participate during committee meetings?
	102b. To what extent do women lead during committee meetings?
	102c. Is the nominating committee chaired by a woman?
Policies	
103.	List all company policies (e.g. health and safety, staff professional development, procurement, gender, forced/child labor, client protection, company code of ethics, conflict of interest, risk management, data security and privacy, community engagement, anti-discrimination, fair compensation, fair hiring, sexual harassment, etc.)

104. For each company policy:	
104a.	Does the policy recognize the different needs of women? (e.g. women as employees, suppliers, customers and community members?) Please explain (e.g. mentorship program and policy supporting career development for women employees in a company with low representation of women in mid to senior-level positions; a health and safety policy that prevents pregnant or breastfeeding women from being exposed to hazardous materials, etc.)
104b.	Does the policy recognize the different needs of men? (e.g. men as employees, suppliers, customers and community members?
104c.	Is the policy used by women and men?
104d.	Does the policy include affirmative action, quotas or other measures to increase the number of women or men employees, suppliers or customers?
104e.	To what extent have women contributed to the development of the company policy? (e.g. women as managers, non-management level staff and individuals outside the company?)
104f.	To what extent have men contributed to the development of the company policy? (e.g. men as managers, non-management level staff and individuals outside the company?
105.	Does the company consciously promote the values of inclusion, participation, equality, non-discrimination, transparency and accountability?
106.	Does the company have access to external advisors with gender expertise? (e.g. gender mainstreaming in human resources policies and practices, sales and marketing, procurement, environmental impact, etc.)
107.	Are there local rules and regulations that restrict women or men from participating more in the workplace? (e.g. maternity/paternity leave, property rights, access to transport, etc.)

Environment

108. Does the company have an environmental policy in place?

108a. Does the environmental policy address women's concerns? (e.g. women as employees, suppliers, customers and community members?) Please explain (e.g. women customers benefit from a clean cook-stove product, which removes the need for her to travel long distances to collect firewood; women community members protesting local mining activities are more vulnerable to violence and sexual assault, etc.)

108b. Does the environmental policy address men's concerns? (e.g. men as employees, suppliers, customers and community members?) Please explain

108c. How are women benefiting from the company's environmental policy? (e.g. women as employees, suppliers, customers and community members?) Please explain (e.g. protection of nearby water sources which women use to collect water for their families; incentive programs that encourage women employees to bike to work; women community members are actively invited to participate in land-use decisions because few have land rights; an agribusiness provides conservation agriculture techniques specific to weeding, a role that may be typically performed by women farmer suppliers)

108d. How are men benefiting from the company's environmental policy? (e.g. men as employees, suppliers, customers and community members?) Please explain (e.g. an agribusiness provides conservation agriculture techniques specific to harvesting, a role that may be typically performed by men farmer suppliers)

108e. To what extent have women contributed to the development of the environmental policy? (e.g. women as managers, non-management level staff and individuals outside the company such as community members?)

	108f. To what extent have men contributed to the development of the environmental policy? (e.g. men as managers, non-management level staff and individuals outside the company such as community members?)

109. Has the company conducted an environmental assessment or audit in the last four years?

	109a. Did the assessment/audit involve women employees in the process?
	109b. Did the assessment/audit involve men employees in the process?
	109c. Did the assessment/audit measure the company's impact on women community members?
	109d. Did the assessment/audit measure the company's impact on men community members?

110. Has the company conducted training on environmentally sustainable practices for women and men employees?

	110a. How many women employees received environmental training in the last 12 months?
	110b. How many men employees received environmental training in the last 12 months?
	110c. What topics are included in the environmental training? Are women and men's needs and impacts taken into consideration?

111. Does the company sell green products and services to customers? (e.g. energy efficient appliances, clean cook-stoves, organic food, non-chemical fertilizers, etc.)

	111a. Is there a difference between women and men customers purchasing green products and services?

112. Does the company have a green procurement strategy to source from suppliers implementing environmental business practices?

	112a. Is there a difference between women and men suppliers in terms of application of environmental business practices?

113.	Has the company delivered environmental training or support to suppliers?
	113a. Is there a difference between women and men suppliers in attending or applying environmental training?
114.	Does the company have specific objective(s) to benefit the environment? (e.g. energy efficiency, waste management, sustainable land use, air pollution, deforestation, water scarcity, hazardous materials, etc.)
	114a. To what extent have women contributed to the development of company environmental objectives? (e.g. women as managers, non-management level staff and individuals outside the company?)
	114b. To what extent have men contributed to the development of company environmental objectives? (e.g. men as managers, non-management level staff and individuals outside the company?)
	114c. How do women stakeholders (e.g. employees, community members, suppliers, etc.) benefit from the company environmental objectives?
	114d. How do men stakeholders (e.g. employees, community members, suppliers, etc.) benefit from the company environmental objectives?
115.	Does the company have a 'green team' or environmental sustainability committee?
	115a. How many women and men are a part of the green team/committee?
	115b. Do any of the green team/committee initiatives take gender into consideration?

Part V: Financial profile

Annual sales revenue:
Annual sales volume:
Annual gross profit:
Annual EBITDA (earnings before interest, tax, depreciation and amortization):
Annual total assets:
Annual total equity:
Annual total liabilities:
Total market share (if available):
Annual total expenses incurred to pay for employee benefit plans (if available):

General remarks from facilitator:

Interview Tool: Focus Group Discussion

Purpose	This is used to facilitate discussion with a group of junior/frontline employees. This is one of two interview tools used by facilitators to collect information during a two-day Full Assessment at company offices.
User	Capacity builder (preferred) or investor
Description	GEM focus group discussions are typically conducted with four to ten women and men staff at lower levels of the company. After collecting the initial background information, the discussion questions are designed to foster discussion among respondents. Many of the questions aim to understand the types of company resources and policies available to support staff, whether those resources and policies are equally accessible to staff, and who are the primary users of those resources and policies. The questions also seek to understand any gaps in the company's interaction with staff. Tips for effective facilitation are included in Guidance Tool: Facilitating a Full Assessment.

Background questions

Note, the background questions are designed as a warm up for the group. They are meant to obtain general information and averages, not individual responses.
1.   Job department(s) of focus group discussion participants
2.   How long have you been working at the company?
3.   How did you hear about the company and the job opportunity?
4.   How did you get hired by the company?

Discussion questions

1.	Do all staff (women and men employees at various job levels and departments) receive training that is provided or supported by the company? What types of training are available?
2.	Are there career opportunities for all staff at the company, such as job rotations or internal promotions?
3.	Do all levels of staff receive regular performance appraisals with their manager?
4.	What is the culture / workplace environment at the company? Does this affect women and men differently?
5.	Are all staff encouraged and feel safe to openly express their opinions and views?
6.	Do all staff have opportunities to provide feedback to company management? How so?
7.	Do all staff have access to a confidential employee feedback system to communicate complaints, issues in discrimination, sexual harassment, etc.?
	7a. Have you used the employee feedback system?
8.	Do company policies and practices respect and accommodate women and men's specific needs?
	8a. What company policies and practices have you used or benefited from?
9.	Does the company value and prioritize gender equality? How so? (e.g. with respect to employees, leadership, customers, suppliers, community members?)
10.	Are there company policies that could be improved? How so?
11.	Are there company practices that could be improved? How so?

Guidance Tool: Facilitator Observations

Purpose	A discussion guide for a team of facilitators to use to debrief on how the Full Assessment went.
User	Capacity builder (preferred) or investor
Description	These questions ask the team of facilitators to discuss and reflect on the company's capacity and interest to mainstream gender equality within business policies and practices. It is completed after finishing a Full Assessment with the company. The respondent is the team of facilitators, not the company.

Discussion questions

1. Walking around the office, what did you observe? Were there areas with more women or more men?

2. How hierarchical is the company? How does this influence gender norms and practices in the company?

3. Are employees supported to use gender inclusive language in everyday interactions with employees and customers?

4. What is the company's corporate culture? Are they rules-based/compliance oriented? Are they informal/fluid/innovation-based? How does this influence gender norms and practices in the company?

5. How does the company's sector influence gender norms and practices?

6. Was there anything that surprised you during the Full Assessment?

7. How did the company communicate the GEM assessments to employees?

8. How transparent and open was the company during key informant interviews, document reviews, and focus group discussions?

9. Did staff appear comfortable to speak their mind or were they withholding information/opinions?

10. Were there questions that respondents refused to answer? Why do you think that was the case?

11. How responsive and accommodating has the company been to data gathering requests?

12. Overall, what proportion of the questions was the company able to answer?

13. How many different employee job levels and departments were you able to access? Were there individuals you were unable to speak with? Why?

14. Were there any particular sub-groups of employees that seemed disadvantaged or subject to bias (gender bias or other)?

15. Do the principles of human rights (inclusion, participation, equality, non- discrimination, transparency and accountability) seem to guide the company and its interaction with women and men staff at all levels?

16. Did staff, especially senior management demonstrate an understanding of and interest in advancing gender equality?

17. Is the company willing to commit the resources necessary to improve the participation of women and men in their business?

18. Is the company willing to commit the time now to improve the participation of women and men in their business?

19. Is there buy-in from senior management and investors?

20. Any other observations related to the company's capacity and commitment to gender equality?

Guidance Tool: GEM Report Preparation

Purpose	To analyze assessment results, make recommendations and summarize these in an organized GEM Report. The GEM Report is submitted to companies in Step 4 – Strategy Development.
User	Capacity builder (preferred) or investor
Description	After recording company responses from a Full Assessment, the user can complete the following actions. Note that the company is not a participant in this process.

What is the GEM report?

The GEM Report summarizes the analysis of assessment results and makes GEM recommendations for implementation at the business. The primary audience is company senior management. It is suggested that the investor also receive a copy of the report. The report's tone is professional, data-driven and supportive. When criticism is included it is best to word constructively and without targeting specific employees. A suggested table of contents and guidance on the report's sections are described below. The report format can be adapted to the company's corporate culture and local country context. For instance, in certain countries it is more appropriate to describe the analysis first before outlining a summary of the recommendations.

GEM Report Table of Contents

- Purpose of the Report
- Summary of Recommendations
- Analysis of Assessment Results
- Recommendations
- Appendix A
  Gender Equality Mainstreaming (GEM) Full Assessment
- Appendix B
  GEM Schedule
- Appendix C
  Case Studies from Industry

Action 1: Hold facilitator debrief

The team of facilitators debrief on the Full Assessment process and results.

Guidance Tool: Facilitator Observations

Action 2: Calculate quantitative data

Similar to the analysis of Scoping Assessment results, responses from quantitative questions can be calculated into percentages and ratios. Percentages will show where women and men are represented (and are not) within business operations. Ratios and other figures can show whether women and men are treated equally. The following table is a sample template for analyzing the quantitative results from the Full Assessment. Note that data provided from the Scoping Assessment and advanced questions from the Full Assessment are also included.

Representation (percentage) analysis	% of women*	% of men
Employees		
Full-time employees		
Part-time employees		
Managers		
Senior managers		
Employees hired in the last 12 months		
Employees promoted in the last 12 months		
Employees exited in the last 12 months		
Employees in specified company department (E.g. procurement, finance, sales, etc.)		
Employees at specific job level (E.g. entry level, associate, manager, technical lead, etc.)		
Employees participated in training or professional development programs in the last 12 months		
Employee occupational injuries in the last five years		
Employee occupational fatalities in the last five years		
Customers		
Customers reached in the last 12 months		
Total annual sales generated by gender		
Repeat customers		
Employees working on the company's product and services development team		
Employees working on the company's product and services delivery or distribution team		

* To calculate the percentage of women, divide the number of women stakeholders by the sum of women and men stakeholders

Representation (percentage) analysis	% of women*	% of men
Employees trained to serve the gender-specific needs of customers		
Employees working on the company's promotional strategy and materials for company products and services		
Suppliers		
Suppliers purchased from in the last 12 months		
Employees working in the company's procurement department		
Governance		
Board members		
Individual ownership in the company		
Institutional ownership in the company		
Internal committee member chairs		
Internal committee members		
Environment		
Employees that received environmental training in the last 12 months		
Green products and services sold to customers in the last 12 months		
Suppliers the company sourced from that implement environmental business practices in the last 12 months		
Employees that are a member of the company's 'green team' or environment committee		

Other gender equality indicator analysis	Women	Men
Employees		
Annual employee turnover		
Ratio of the average salary paid to women employees compared to men employees, excluding management level staff	[insert ratio here]	
Ratio of the average salary paid to women managers compared to men managers	[insert ratio here]	
Percentage of the company's top 10% compensated employees who are women	[insert percentage here]	
Customers		
Average profit margin generated from gender-specific products and services		
Average annual sales generated by employees		

Action 3: Analyze responses

Analyze all quantitative and qualitative data collected from the Scoping and Full Assessments including observations made by the facilitator. Tips for analysis are described in the box below.
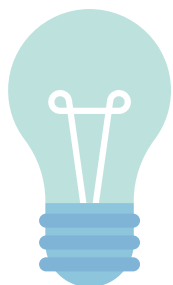
Tips for analyzing Scoping and Full Assessment data

- For interview questions that involve a "yes/no" answer, "yes" responses usually indicate more gender equitable business practices.

- For quantitative questions, a balanced representation of women and men indicates greater gender equality. Equal treatment of women and men can be positive (e.g. pay equity) but there are cases where differentiated treatment towards women and men achieves more gender equitable outcomes (e.g. flexible working hours for women who may bear greater care-giving responsibilities at home).

- Compare and contrast quantitative and qualitative data to triangulate trends or identify discrepancies.

- For conflicting data and divergent perspectives, consider the factors that may be causing the conflict.

- Look for patterns in the data. Try to draw connections between the responses to gain a larger picture of the company's performance and potential in GEM.

Action 4: Complete GEM spectrum analysis

Based on the analysis, determine where the company is located along the Gender Equality Mainstreaming (GEM) Spectrum depicted below.[1] The spectrum indicates the extent to which the company mainstreams gender equality across environmental, social and governance criteria. Understanding the company's position on the spectrum is useful for determining the most appropriate GEM strategies for the company. 📖🔍 Guidance Tool: Facilitator Observations is particularly informative for this analysis.

Gender Equality Mainstreaming Spectrum

Gender negative

Company practices and policies overtly exclude women or men. The company may have rigid views on the economic roles that are 'more appropriate' for women or men, or they may be gender blind, denying the impact of gender on operations. The company is reluctant to share data.

Gender proactive

The company has implemented GEM initiatives in parts of business operations on an ad hoc basis. The company is open to sharing data.

Gender aware

The company is aware of gender equality opportunities in business operations but has not acted on them. The company may show some unconscious bias towards women and men. The company is likely open to sharing data.

Gender strategic

The company integrates GEM in daily business operations and decision making such that it is core to their business. The company is very open to sharing data.

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[1] Similar spectrums have been created by like minded organizations. For instance, the Gender Practitioner's Collaborative Minimum Standards for Mainstreaming Gender Equality and the Australian Government's Gender Strategy Toolkit, among others.

Action 5: Brainstorm GEM recommendations

Using the criteria below, determine up to five viable GEM recommendations for the company. Example recommendations are presented subsequently.

Criteria for determining GEM recommendations

Gender equality impact
How does the recommendation benefit women and men and work towards greater gender equality? What are the expected short-term changes and long-term impacts for women and men? Does the recommendation aim to reduce disparities between women and men?

ESG materiality
Does the recommendation mainstream gender in at least one ESG area? Does the specific element of the ESG area pose a material opportunity or risk to company performance?

Alignment to business priorities
Does the recommendation support the achievement of business objectives? Does the recommendation help overcome a specific challenge faced by the company?

Appropriate
Does the recommendation make sense given the company's position along the GEM spectrum? Will the recommendation resonate with senior management and investors?

Realistic
Is the recommendation reasonable to achieve with limited time and resources? Does the recommendation make sense given the company's size, resources and growth path?

Data driven
Is the recommendation supported by qualitative and quantitative data that was provided by different respondents?

Measurable
What are the expected quantifiable financial and gender equality ESG impacts of the recommendation? How will these be measured? How will the company know if it was successful?

The importance of measuring gender disaggregated data

During the assessment, if the company could not respond to certain questions because they did not measure them, the most appropriate recommendation may be to set up a system for measuring those areas. Collecting gender disaggregated data is often a first step because it critically informs the development of future, more advanced GEM strategies. For example, a company selling health insurance to businesses is not aware of whether their customers are women or men owned/managed businesses. A facilitator could recommend that the company establish a definition and system for tracking the number of women and men business customers (e.g. the gender of the CEO, the proportion of women and men employees accessing health insurance from business customers, etc.). Collecting this data allows the company to better understand their target market and identify more sophisticated strategies, such as training sales staff to better meet the differentiated product needs of women and men businesses.

Example GEM recommendations in environmental, social and governance criteria

These are generic GEM strategies and are used for illustrative purposes only. Actual strategies recommended for companies can be different and are customized to the business context and operating environment.

Environmental GEM Recommendations	Business Outcomes
Establish an **environmental policy** that ensures women and men employees at various levels of the company are contributing to policy development. The company may choose to nominate a woman manager to establish the policy.	▪ Mitigate risk
Launch an internal **'green team'** or environment committee to prioritize environmental initiatives within the company (e.g. walk, bike or bus to work, composting organics, buying from local businesses). The green team is represented by both women and men employees. Initiatives include discussions on how women and men interact with the environment.	▪ Employee retention ▪ Attract talent
Define company **environmental objectives** and an action plan that clearly defines the benefits for the environment and women and men stakeholders. To track progress towards objectives, define, set targets, monitor and report on key performance indicators that include women and men.	▪ Mitigate risk ▪ Reduce costs
Embed environmental sustainability topics within existing **employee training** modules. For example, the purchasing team receives training on how to procure from local women and men owned/managed businesses. The company can set targets for the number of women and men staff trained in environmental sustainability in the next twelve months.	▪ Employee capabilities
Conduct a company-wide **environmental audit** that includes soliciting feedback from women and men community members about the environmental impacts of company operations. It is recommended to involve women and men employees in managing the audit.	▪ Boost reputation
Implement an **environmental management system** that is sensitive to women and men's needs. For example, if a company operates in the manufacturing sector, it ensures that nearby water sources, primarily used by women collecting water, are protected from waste generated from company operations.	▪ Mitigate risk
Launch a marketing strategy for **environmentally friendly products** targeting women. For example, a producer of clean cook-stoves launches an awareness raising campaign targeting women responsible for collecting firewood in their communities.	▪ Increase sales

Social GEM Recommendations	Business Outcomes
Employees	
Establish an employee **diversity performance management system** by regularly measuring, analyzing and actioning gender disaggregated data. Company may monitor key performance indicators by women and men such as recruitment, hiring, promotions, performance, compensation, attendance, absenteeism, etc. 📋 Planning Tool: Indicators for Employee Diversity Performance Management System found in Step 5 – Implementation provides example indicators.	▪ Employee retention ▪ Attract talent
Hire an external organizational development consultant to conduct a more **thorough assessment** of company HR policies and procedures to identify additional areas for improvement. For example, analyzing field offices or additional research and learning into recruitment and promotion practices.	▪ Employee retention
Execute a strategy to **increase the proportion of women employees in departments and job levels** where there is low representation. The same strategy can be applied with men employees. Job rotations, internship and trainee placements, targeted recruiting from colleges/universities with high women graduation rates, coaching and professional development programs may be part of the strategy.	▪ Increase productivity
Launch **training programs** for women and men employees, which mainstreams gender within job specific trainings, as well as offers a standalone training on gender awareness. Other training modules may include gender and social norms, employee code of conduct, new employee orientation, unconscious bias, confidence, communication and life skills.	▪ Employee capabilities
Develop **inclusive workplace practices** including flexible work schedules, telecommuting options, lactation rooms, childcare facilities, return to work programs (for employees during and following parental leave), confidential feedback systems for staff, etc.	▪ Increase productivity ▪ Employee retention ▪ Attract talent
Start an **employee wellness program** for women and men employees. The program may include the provision of trainings on topics such as work-life balance and mental, physical and emotional health. Also, connecting women and men employees to medical experts, such as gynecologists, oncologists, physiotherapists, industrial organizational psychologists, therapists, ergonomic specialists, massage therapists, workplace health and safety specialists, etc. Wellness programs may be targeted and delivered separately to women and men employees.	▪ Employee retention
Provide **mentorship, coaching and career development** programs targeting women and/or men employees. Programs can pair junior staff with senior managers to develop junior staff soft and hard skills, and position them for career growth within the company.	▪ Employee capabilities ▪ Employee retention

Develop programs whereby senior leaders **sponsor women (or men) employees** to build their confidence and skills, ultimately supporting them in moving up in company ranks. Sponsorship involves advocating for the employee and identifying opportunities for their professional development.	▪ Employee capabilities ▪ Employee retention
Expand **recruitment strategies** to attract applicants from larger and more qualified talent pools. Example strategies include: advertising job postings in diverse channels such as women business associations or women's job sites, target recruitment with training institutes, colleges and universities with high rates of women graduates, etc.	▪ Attract talent
Create safe forums and spaces to foster **employee dialogue** about their perspective on gender and how gender impacts company operations.	▪ Employee retention
Conduct annual **employee satisfaction surveys** and disaggregating responses by women and men. Companies may consider using a third-party survey administrator to ensure honest responses and employee confidentiality.	▪ Employee retention
Customers	
Establish a **customer database** which disaggregates customer data by women and men such as: sales, profit margin, repeat customers, customer satisfaction, etc. Develop and implement action plans to improve performance based on customer data analytics.	▪ Market insight
Conduct **market research** to identify the unmet needs of women and men customers. Research may include surveys, literature review, focus group discussions, prototyping and testing, etc.	▪ Market insight
Create **products and services** that specifically target women or men customers. Targeted products and services should meet specific needs experienced by women or provide a specific benefit to women customers. It is suggested to consult women and men in the research and development of products.	▪ Increase sales ▪ Expanded markets
Launch a **marketing strategy** targeting women or men customers. Strategies may include adjusting pricing to be more appropriate for women customers, changing placement or distribution of products to increase access for women customers, or adapting promotions to reach women customers with the right messaging.	▪ Increase sales
Offer **sales and customer service training** for women and men employees to better serve the unique needs of women and men customers.	▪ Employee capabilities ▪ Increase sales
Ensure sales, marketing and customer service **teams are gender balanced**. See suggested strategies under employee section above to increase women (or men) in sales and marketing roles.	▪ Increase productivity

Suppliers

Establish a **supplier diversity database** by regularly measuring, analyzing and actioning gender disaggregated data. The company may monitor key performance indicators by women and men suppliers such as: price and volume of goods/services purchased, quality and reliability of goods/services purchased, # of incidents reported, etc.	- Mitigate risk - Reduce costs
Implement a **procurement strategy** to diversify sourcing from both women and men individual and small-scale suppliers. If the company sources from large and multinational companies, assess each supplier's commitment to gender equality within their business operations, and subsequently target sourcing from gender equitable suppliers**.**	- Mitigate risk - Reduce costs
Provide **value-added services to suppliers** that meet the specific needs of women and men suppliers, such as attractive payment terms, supply chain finance, job skills training, etc.	- Mitigate risk - Increase sales

Governance GEM recommendations	Business outcomes
Increase representation of women on the Board of Directors through appointing a woman director. If the board has low representation of men on the board, aim to appoint men directors.	- Improved business strategy
Promote **diverse leadership** at the board, committee and senior management levels. Efforts should be made to prevent the same gender to fill the roles of Chair of the board and CEO over multiple terms.	- Improved business strategy
Establish a **diversity committee** at the board level. A diversity committee is responsible for improving the gender balance in company employees, customers and/or suppliers. This may be done through overseeing a diversity performance management system, which monitors, analyzes and actions gender disaggregated data.	- Employee retention - Increase productivity - Attract talent
Establish a **sexual harassment policy** including confidential staff complaints and grievances procedures (e.g. setting up internal committee, ombudsman or anonymous "complaints box"). Delivering employee training alongside the establishment of a sexual harassment policy ensures staff are aware and feel supported to use the policy.	- Mitigate risk - Employee retention
Actively **engage stakeholders**, particularly junior staff and middle level managers, in the development and updating of company policies. Stakeholders may also include customers, suppliers, and community members, as appropriate. This can encourage compliance with policies, and provide new ideas on ways to make policies more effective and inclusive.	- Employee retention - Mitigate risk
Implement **policies that promote gender equalit**y such as anti-discrimination, fair compensation, fair hiring, sexual harassment, etc. Communications and training can be provided to employees during roll out of new policies.	- Increase productivity - Mitigate risk

Conduct **gender awareness training** for the senior leadership team, which can be particularly effective for executive teams that are men-only (or women-only). Training may include modules on social and gender norms, unconscious bias, the relationship between diversity and innovation, etc.	▪ Mitigate risk ▪ Improve business strategy

Action 6: Prepare GEM Report

As described at the beginning of this tool, the GEM Report contains two key sections: (1) a summary of the analysis of assessment results and (2) recommendations on GEM strategies for implementation. Appendixes may also be included.

Guidelines for analysis section of GEM Report

As a general rule, the analysis section is no longer than two pages. A short report is more accessible to senior executives who have limited time. The analysis section reflects the key findings from the Scoping and Full Assessments. It does not include everything, but covers the most significant trends and insights. There should be an intuitive connection between the analysis and the recommendations that follow, including sector and country specific statistics which can support analysis.

Guidelines for recommendations section of GEM Report

Recommendations are summarized at the beginning of the report and then expressed in more detail in a subsequent section. This layout allows the reader to understand what is being proposed upfront before reading any further. Recommendations are supported by analysis of the Full Assessment data. Mentioning industry data and local company case studies can help substantiate recommendations.

Guidelines for appendixes of GEM Report

It is useful to include a cleaned copy of Communication Tool: Assessment Schedule and Interview Tool: Full Assessment (note: facilitator comments and specific employee names should be removed). This data provides full transparency on how the analysis and recommendations were determined. Additional appendixes can be added, such as case studies featuring companies that have successfully implemented one of the proposed recommendations.

Step 4
Strategy
Development

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
IDENTIFICATION	SCOPING ASSESSMENT	FULL ASSESSMENT	STRATEGY DEVELOPMENT	IMPLEMENTATION MONITORING & LEARNING	IMPACT MEASUREMENT

Develop gender equality mainstreaming strategies and plans in collaboration with companies that align with their business growth and impact priorities.

The fourth step involves collaborating with companies to develop gender equality mainstreaming strategies and plans to implement within business operations.

This builds off the recommended strategies from Step 3 – Full Assessment.

What is Strategy Development?

Strategy Development is a collaborative process between the company, capacity builder and investor to brainstorm, formulate, refine, select, and plan GEM strategies that are aligned to ESG criteria. Through facilitated discussion, the most viable GEM strategies to improve business growth, impact and gender equality are selected for implementation.

    Guidance Tool: Facilitating Strategy Development

    Communication Tool: GEM Report

    Interview Tool: GEM Report Feedback

    Guidance Tool: Implementing Actors

    Planning Tool: Implementation Plan

What can Strategy Development and planning be used for?

Strategy Development is a process for **companies, capacity builders and/or investors** to co-design the GEM strategies they want to implement and how implementation will take place. In contrast to Step 3 – Full Assessment, where the capacity builder recommends GEM strategies, Step 4 allows the company and investor to provide feedback on the recommended strategies, suggest their own ideas for viable strategies, and determine which strategies they would like to pursue immediately. Strategy Development is an important step to gain senior management and investor buy-in, as well as ensure GEM strategies closely align with business operations.

Who can conduct Strategy Development and planning?

Similar to the previous steps in the GEM Framework, capacity builders with gender, ESG and business experience are strongly preferred to facilitate the Strategy Development process.

Self-Guided Company

A company may complete Strategy Development using a team of two to three women and men employees to facilitate the process outlined in Step 3 – Full Assessment, though an external capacity building organization is preferred. It is recommended that the team of employees is led by an experienced senior manager who is knowledgeable in diversity, inclusion, human resources and business operations.

Guidance Tool: Facilitating Strategy Development

Purpose	How to prepare for and develop GEM strategies and plans with a company.
User	Capacity builder (preferred) or investor
Description	This tool provides guidance on how to conduct strategy development sessions with a company. It describes who participates, what is completed beforehand (e.g. communicate GEM report, receive feedback on GEM report), and the specific actions related to Strategy Development. In addition, guidance on identifying the lead organization and creating an implementation plan are included.

How to conduct Strategy Development sessions?

Sessions to develop gender equality mainstreaming strategies and plans are conducted in an open and creative meeting environment. The facilitator will likely need to hold more than one session to fully develop strategies and implementation plans. It is best to use a gender diverse team of at least two facilitators including at least one local consultant.

Who participates in the Strategy Development sessions?

At least three or more women and men members from the company's senior management team participate in Strategy Development. It is ideal for senior managers to represent diverse departments such as human resources, sales and marketing, research and development, finance, operations, and they may choose to invite other women and men staff to offer their perspective. The investor is also invited to participate and can add invaluable insight and buy-in to the process. It is essential to involve both women and men and key senior decision makers in the sessions to ensure there is ownership for GEM strategies.

What preparation is required before the Strategy Development sessions?

Before Strategy Development sessions, the facilitator submits the GEM Report to the company and investor or sponsor. The facilitator then conducts a feedback discussion with the company and investor. Findings from the feedback discussion provide a useful starting point for the Strategy Development sessions.

Communication Tool: GEM Report

Interview Tool: GEM Report Feedback

Actions to facilitate Strategy Development sessions

The following actions are suggested guidelines to facilitate Strategy Development sessions:

Action 1: Summarize feedback on GEM Report

At the start of the meeting, the facilitator summarizes GEM Report feedback received from the previous meeting and recorded in Interview Tool: GEM Report Feedback. The facilitator validates the report's recommendations that were most and least popular with participants, and makes note of any changes. The facilitator ensures there is no remaining feedback about the GEM Report since some participants may not yet have had the chance to review the report.

Action 2: Brainstorm GEM strategies

Using a participatory format (see below tips for effective brainstorming), the facilitator engages meeting participants in a lively brainstorming session to generate potential GEM strategies.

The objective of this step is to generate as many ideas as possible (see seven rules in brainstorming sessions pictured below). Effort is made to gain input and ideas from all women and men participants. Some participants may need independent time to develop their idea(s) before sharing it with the group. It is helpful to ensure that the GEM Report's recommended strategies are part of the discussion and that all three areas of ESG are covered.

To help advance the discussion, the facilitator can suggest example GEM strategies such as those listed in the following resources:

- Guidance Tool: GEM Report Preparation of Step 3 – Full Assessment refer to section "Example GEM recommendations in environmental, social and governance criteria"
- Annex A: Additional Resources for GEM in environmental, social and governance
- GEM recommendations for each ESG standard, which are part of the online GEM self-assessment

Seven rules in brainstorming sessions

1	Defer judgment
2	Encourage wild ideas
3	Build on the ideas of others
4	Stay focused on the topic
5	One conversation at a time
6	Be visual
7	Go for quantity

Source: IDEO, 2017

Once participants have shared all ideas and generated a list of proposed GEM strategies, the facilitator supports participants to combine strategies into categories or themes.

After organizing the strategies into categories, participants discuss whether the ideas generated and the associated categories align with the initial objective of the brainstorm (Inspire UX, 2013).
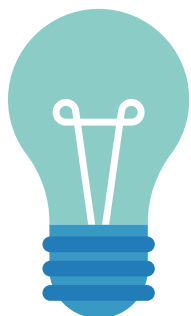
Tips for effective brainstorming

- Inspire UX Tips for Structuring Better Brainstorming Sessions blog
- Harvard Business Review Your Team is Brainstorming All Wrong blog
- Mind Tools Brainstorming Toolkit
- FSG Facilitating International Group Learning practical guide
- Shopify How to Develop an Effective Creative Brainstorming Process blog

Action 3: Define evaluation criteria and assess GEM strategies

After generating ideas for GEM strategies, the facilitator guides participants in defining priority criteria that can be used to evaluate ideas. Once criteria are identified, participants can discuss how each GEM strategy fulfills the defined criteria. Facilitators may choose to use the table below as a template to facilitate the assessment of GEM strategies against criteria.

Criteria	Strategy 1	Strategy 2	Strategy 3
Gender equality impact – How does the strategy benefit women and men and work towards greater gender equality? What are the expected short-term changes and long-term impacts for women and men? Does the strategy aim to reduce disparities between women and men?			
ESG materiality – Does the strategy mainstream gender in at least one ESG area? Does the specific element of the ESG area pose a material opportunity or risk to company performance?			
Alignment to business priorities – Does the strategy support the achievement of business objectives? Does the strategy help overcome a specific challenge faced by the company?			
Appropriate – Does the strategy make sense given the company's position along the GEM spectrum? Will the strategy resonate with senior management and investors?			
Realistic – Is the strategy reasonable to achieve with limited time and resources? Does the strategy make sense given the company's size, resources and growth path?			
Data driven – Is the strategy supported by qualitative and quantitative data that was provided by different respondents?			
Measurable – What are the expected quantifiable financial and gender equality impacts of the strategy? How will these be measured? How will the company know if it was successful?			

Utilizing a method of the facilitator's choice, the facilitator asks participants to vote on the top GEM strategies based on the established criteria.

Action 4: Summarize top GEM strategies

The facilitator summarizes the GEM strategies that received the greatest support from participants and are best aligned with the evaluation criteria. Subsequently, the facilitator holds a group debrief to discuss participant's initial impressions about the top GEM strategies.

Action 5: Select GEM strategies

Depending on the pace of the discussion, it may be obvious to the company and investor which GEM strategies are most appropriate to select for implementation. However, participants may need additional meetings to discuss and make a decision. The number of GEM strategies selected will depend on the scope, resources available and time-line for implementation.

Action 6: Define the lead and supporting implementing organizations

Either during the Strategy Development session or as a separate follow up meeting, the capacity builder, company and investor determine the organization responsible for leading the implementation of GEM strategies. This may have been decided ahead of time. Those unsure of which organization will lead implementation can use:

Guidance Tool: Implementing Actors

In addition to determining the lead, it is suggested to define the organizations supporting implementation and their respective roles. It is preferable to involve all stakeholders in implementation. Stakeholders may include company managers and staff, capacity builder, investor, external technical experts, and funder, if applicable. However, the specific responsibilities of each organization depend on several factors, such as the availability of human and financial resources, access to technical experts, the relationship between the company and investor, and stakeholders' expectations, among others.

Action 7: Create implementation plan

After defining the roles, the lead implementing organization prepares a draft plan to implement GEM strategies.

Planning Tool: Implementation Plan

Supporting partners are suggested to be engaged to review, revise and finalize the implementation plan. It can be particularly effective to involve the capacity builder (or company if they are not leading) in reviewing the first draft to improve the plan before circulating to the investor and other partners for input.

Communication Tool: GEM Report

Purpose	To distribute the GEM Report to the company and investor and arrange for a time to discuss their feedback on the report.
User	Capacity builder (preferred) or investor
Description	This tool is comprised of a suggested email template to share the GEM Report (as an attachment to the email) and schedule a meeting to solicit senior management and investor comments on the report once they have had time to review. It is strongly recommended to copy the investor on this email. This will keep the investor informed about the GEM process, as well as invite them to participate in strategy development. This email is for illustrative purposes only. Communications with companies are modified based on the context. Resourcing, partnerships and other key areas will influence the messaging to companies.

Dear [company manager],

I am pleased to share with you the attached Gender Equality Mainstreaming (GEM) Report for [company name] that has been prepared by [Facilitating organization]. This report is the result of your participation in the GEM Full Assessment on [dates of assessment]. It includes an analysis of the findings from the assessment and specific recommendations to improve gender equality within your business operations.

We would like to arrange an in-person meeting with [company name's] senior management team to present the report's findings and discuss your feedback on the report and the process to date. Would one of the following dates work for a two-hour meeting:

[Proposed dates and times]

If after holding this meeting, [company name's] management team is interested in implementing strategies to mainstream gender equality in company operations, we will set up a follow up meeting. The purpose of the follow-up meeting is to design strategies most aligned to your business and with the greatest potential for positive gender and financial impact. We will develop these strategies together in a participatory format so that your views are clearly reflected in the strategies. Please note this process may take more than one meeting to complete.

Thank you for your continued participation in the gender equality mainstreaming initiative. We look forward to hearing from you shortly.

Interview Tool: GEM Report Feedback

Purpose	A discussion guide to obtain feedback from the company and investor on GEM Report findings.
User	Capacity builder (preferred) or investor
Description	This tool includes a suggested set of discussion questions to obtain feedback on GEM report analysis and recommendations.

Discussion questions

1. Did you have an opportunity to read the GEM Report?

2. What were your first impressions of the GEM Report?

3. What parts of the report resonated with you? (e.g. in the analysis section, recommendations section and appendixes)

4. What parts of the report did you disagree with? (e.g. in the analysis section, recommendations section and appendixes)

5. Did anything surprise you? (e.g. in the analysis section, recommendations section and appendixes)

6. Did anything make you think differently about your company? (e.g. in the analysis section, recommendations section and appendixes)

7. What recommendations are you most excited about and why?

8. What recommendations are you least excited about and why?

9. What recommendations are the most feasible to implement now and why?

Guidance Tool: Implementing Actors

Purpose	To help determine the lead implementing organization of selected GEM strategies.
User	Capacity builder (preferred) or investor
Description	This tool offers discussion questions and guidance for analyzing responses to help determine whether the company, investor or capacity builder is the most appropriate organization to lead strategy implementation. Responses from this discussion also assist in defining supporting roles filled by remaining partners. Supporting roles may involve technical advisor, company coordinator, technical implementer, company data provider, monitoring and evaluation specialist, etc.

Discussion questions

1.	Is there a highly motivated person who can champion the GEM strategies and their implementation?
2.	Who has technical expertise in gender, ESG, inclusion and business? Who has access to this resource?
3.	Who has the most human resources and time available to implement the GEM strategies?
4.	Do any organizations have existing business activities that overlap with the GEM strategies?
5.	Are there internal or external funding sources available to finance the implementation of GEM strategies?

Guidance for analyzing responses

The company may choose to lead if:

- They have the human resources and time available to lead immediate implementation
- They have a "champion" senior manager who is highly motivated to lead the GEM strategies
- They have access to an internal or external technical expert in gender, ESG, inclusion and business
- There is overlap between GEM strategies and current business activities so that existing resources can be leveraged
- The investor prefers to be less involved in the implementation of GEM strategies

The investor/capacity builder may choose to lead if:

- They are involved with the company at an operational level
- They have the financial and human resources available to lead immediate implementation
- They have a "champion" senior director who is highly motivated to lead the GEM strategies
- They have access to an internal or external technical expert in gender, ESG, inclusion and business
- There is overlap between GEM strategies and current investor/capacity builder activities so that existing resources can be leveraged
- The company lacks the resources to lead immediate implementation of GEM strategies

Regardless of who leads, it is essential to involve other parties (e.g. investor, capacity builder, company, technical experts, funder, etc.) in implementation. To that end, the discussion questions can also indicate the level of involvement desired by each party.

Planning Tool: Implementation Plan

Purpose	To assist implementers in creating a plan to execute selected GEM strategies.
User	Lead implementing organization of GEM strategies (e.g. company, investor, capacity builder)
Description	The implementer completes this planning tool by following the guidance below. Each section of the tool covers a specific aspect of implementation including defining roles and responsibilities, activities, workplan, expected results, and budget.

Role and responsibilities

Describe the lead person responsible for implementation and their job title and contact information. Describe who else is involved, including internal and external partners, and define their respective roles. Both women and men play key roles in implementation and it is suggested to involve senior representatives.

Key activities and purpose

Explain in detail what activities you will do, how you will implement the activities and why you have chosen those activities. Consider how these activities are mainstreaming gender equality within environmental, social and governance areas.

Monthly or weekly work plan

Using the table below, fill out each row completely for each activity that is part of implementation. Activities can be specified for each month or week of implementation. An example is provided below.

#	Activity	Start date	End date	Activity indicator	Target	Responsible
1	Soft skills sales training conducted for women and men sales representatives in small business unit	June 1 2017	June 7 2017	# of women staff completed training # of male staff completed training (if applicable)	30 women 20 men	National Sales Manager

Expected results

Describe who will benefit from the strategy and their role (women and men employees, board members, customers, suppliers, community members, etc.). Explain what the expected results are for the target beneficiaries and the company itself.

Budget

The example budget table below is for illustrative purposes only. Using excel or another preferred platform, specify the expenses related to the strategy including the nature of the cost (e.g. personnel, assets, consultant). In addition to activity-related expenses, include personnel and other costs for implementation, such as monitoring KPIs, communicating and reporting to partners, holding meetings for learning and adapting implementation, etc.

Category	Component	Cost per unit	# of units	Cost
		Daily rate	**# of days**	
Personnel	Project Manager	400	60	24,000
…				
Consultants	Gender Specialist	500	20	10,000
…				
		Cost / trip	**# of trips**	
Travel	Local travel – airfare	150	4	600
…				
		Cost / participant	**# of participants**	
Training Costs	Materials and supplies	10	50	1875
…				
		Cost / asset	**# of assets**	
Capital Assets	Equipment	5,000	1	5,000
Total				

Step 5 Implementation Monitoring & Learning

| STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
IDENTIFICATION	SCOPING ASSESSMENT	FULL ASSESSMENT	STRATEGY DEVELOPMENT	IMPLEMENTATION MONITORING & LEARNING	IMPACT MEASUREMENT

Monitor and learn from implementation of gender equality mainstreaming strategies and use as a management feedback loop.

Once a company has identified the gender equality mainstreaming strategies and developed an implementation plan, the next step is to action selected strategies. Importantly, implementation involves monitoring and learning from progress in order to improve execution.

What is Implementation, Monitoring and Learning (IML)?

A critical aspect of implementing GEM strategies within company operations is the assessment and learning from the execution of chosen strategies. By evaluating progress as activities are completed, companies can learn faster and adapt implementation to more effectively achieve results.
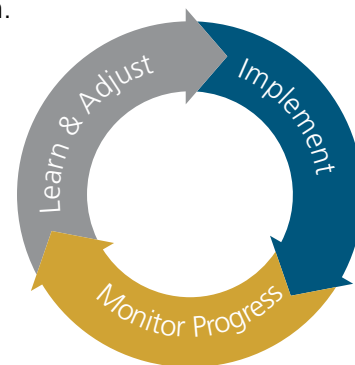
Guidance Tool: Implementation, Monitoring and Learning

Tip Sheet Tool: Successful Implementation of GEM Strategies

Planning Tool: Implementing Gendered Policies

Planning Tool: Indicators for Employee Diversity Performance Management System

Planning Tool: Basic Monitoring Plan

Guidance Tool: Facilitated Learning

Guidance Tool: GEM Next Steps

What can IML be used for?

While Steps 1 through 4 of the GEM Framework focus on examining company operations, identifying the most viable opportunities in GEM and initial planning, Step 5 is the process of actioning selected GEM strategies. As a result, organizations including **companies, investors and capacity builders** who are spearheading or supporting execution of GEM strategies can use this section to inform implementation.

Who is involved in IML?

As described in Step 4 – Strategy Development, one organization leads implementation of GEM strategies with support from partner organizations. Implementing roles are determined jointly by the company, capacity builder and investor. It is best practice to engage more than one organization in the execution (e.g. company, investor, external technical experts, and other stakeholders such as funders).

Self-Guided Company

A company may choose to implement GEM strategies on their own using the guidance and tools in Step 5. As resources permit, the company can identify and engage external partners such as technical experts, funders and shareholders who can support implementation and the achievement of gender equality and financial results.

Guidance Tool: Implementation, Monitoring and Learning

Purpose	To guide implementers on how to execute, track progress, learn from and adjust GEM strategies.
User	Lead implementing organization of GEM strategies (e.g. company, investor, capacity builder)
Description	This tool offers guidance and associated approaches for organizations who are implementing, monitoring and learning from GEM strategies.

How to conduct IML?

Execution, assessing and learning from progress is a continuous process led by the implementing organization and supported by contributing partners. Detailed guidance on the three interrelated actions is described in detail below.
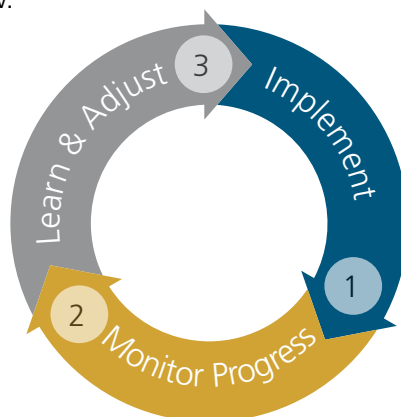
Action 1: Implement

Once the implementation plan developed in Step 4 – Strategy Development is endorsed by all partners, the lead implementer executes the GEM strategies according to plan.

💡 Tip Sheet Tool: Successful Implementation of GEM Strategies

GEM strategies will be as unique as the companies utilizing the GEM Framework. Therefore, the GEM Framework does not provide detailed guidance on specific types of GEM strategies – but does provide several planning tools as examples to draw inspiration from.

Planning Tool: Implementing Gendered Policies

Planning Tool: Indicators for Employee Diversity Performance Management System

Annex B showcases two case studies of companies implementing gender equality mainstreaming strategies for business growth and impact.

Action 2: Monitor implementation

Throughout execution, the lead implementer tracks progress against the workplan through measuring activity indicators, which are specified in ▣ Planning Tool: Implementation Plan of Step 4 – Strategy Development. Activity indicators are useful for monitoring the completion of activities. For example, an e-commerce company launching an email marketing campaign may be interested to know the number of women and men reached by the most recent email blast. It is best practice to not only measure completion of the activity but also the quality or effectiveness of the activity. Using the same example, the company could determine the effectiveness of the marketing campaign by measuring the number of women and men who purchased an item on the company's website as a result of receiving the email.

▣   Planning Tool: Basic Monitoring Plan

Action 3: Learn from and adapt implementation

Implementers of GEM strategies can facilitate learning through a variety of methods, both qualitative and quantitative. Two methods – facilitated learning discussions and reflecting on next steps – are suggested below as a starting point for implementers. These methods are by no means comprehensive. There are a vast number of learning methodologies available including lean startup and results-based management, to name a few. Regardless of the methods chosen, reflecting on progress and lessons learned can be done regularly so that challenges are identified early on and addressed pro-actively. To be efficient with time, these discussions can be incorporated into existing management review meetings. This also helps ensure GEM strategies are not treated as a standalone issue but rather are related to other aspects of the business.

▤   Guidance Tool: Facilitated Learning

▤   Guidance Tool: GEM Next Steps

Tip Sheet Tool: Successful Implementation of GEM Strategies

Purpose	Tips for the successful implementation of GEM strategies.
User	Lead implementing organization of GEM strategies (e.g. company, investor, capacity builder)
Description	This tool contains five tips that can support effective implementation: senior buy-in, external consultants, gender awareness training, quantitative data, and frequent communication.

Secure senior management buy-in

Support for GEM strategies from company senior management allows for efficient and successful implementation. Without a demonstrated commitment at the top, activities will be slow to accomplish, and financial and gendered ESG results will be very difficult to attain. In certain circumstances, senior managers will "talk the talk" but not "walk the walk" in gender equality mainstreaming. Other times, there will be conflicting perspectives about gender at different levels and departments of the company. In these situations, care should be taken to assess whether there is sufficient and genuine commitment from senior management to pursue GEM strategies.

Hire experienced external consultants to support implementation

External consultants knowledgeable in gender, ESG, and the company sector can provide valuable technical expertise for companies. Not only do consultants provide a broad skillset and access to networks, but they also support timely implementation under tight deadlines. They can relieve some of the burden of implementation, particularly for companies with limited human resources. Moreover, consultants bring a fresh set of eyes to activities. Due to their external position, it is easier for them to point out gender bias and social norms that are barriers to achieving results.

Consultants can change attitudes towards gender as well. For example, an Indonesian consumer packaged goods company hired a woman CEO from the same industry to design and deliver gender inclusive training and mentorship for staff. The fact that the consultant was a woman CEO led women employees to see her as a role model and as a result, were highly engaged in the training and mentorship programs.

Develop women and men employees' gender awareness, particularly at senior and junior levels

Increasing employee awareness of gender issues is a good first step in GEM before pursuing other strategies. Senior leaders, who are aware of gender and its relevance to business operations, will prioritize implementation and accelerate the impact of GEM strategies. At junior staff levels, employees who receive job-specific gender training are better equipped professionally and feel more empowered and engaged in their work. This support also demonstrates to junior staff that management appreciate them. At all levels of the company, it is important to include both men and women in gender awareness capacity building.

Implement data-driven strategies

Collecting data informs implementation and maintains buy-in from senior decision makers and investors. Typically, non-financial indicators, particularly gender, have not been measured by companies, resulting in the financial implications of gender dynamics being overlooked. By measuring financial and gendered ESG indicators, companies can uncover surprising relationships between GEM strategies and business performance, which can influence business strategy.

Establish regular communication between lead implementer and partners

Setting up routine meetings for companies, the investor, consultants, and other partners assists in managing relationships, capturing lessons learned, addressing issues early, solving problems collaboratively, among others. In addition to regular meetings, stakeholders may set expectations for ongoing reporting and data sharing.

Planning Tool: Implementing Gendered Policies

Purpose	This is an example template that implementers can use to draft gendered company policies. This particular example demonstrates a gendered environmental policy, however similar templates can be developed for other company policies.
User	Lead implementing organization of GEM strategies (e.g. company, investor, capacity builder)
Description	This template illustrates a gender inclusive company policy. Specifically, it is an example of mainstreaming gender equality in an environmental policy. An environmental policy is showcased because the environmental area of ESG is often perceived as the most difficult to mainstream.[2] The bullet points offer guidance for suggested content. Development of policies will be highly variable depending on the focus, company and context.

[Company Name]

Gendered environmental policy

[3-5 pages]

Date created:

Date of last revision:

Introduction

- Describe the commitment your company has to environmental stewardship and how women and men stakeholders are involved and impacted.
- Provide background on how this policy document was created. Specify who participated in the development of the policy. For example: men and women employees, collaboration among various departments, women and men stakeholders including community members and suppliers, board ratified, etc.

Compliance

- Recognition that you will comply with relevant environmental legislation as a minimum level of performance. Ideally, you will further adapt as needed to consider the different needs that may exist for women and men.
- List the regulatory bodies and environmental policies with which you must comply (e.g. national government; regional government) and provide a brief description of the requirements, and how they might be more gender inclusive as applicable.

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[2]During the development of the GEM Framework, various key informants including Women's World Banking and Win-Win Coalition confirmed that environment is the least developed ESG criterion in terms of gender equality mainstreaming.

Environmental management strategy

- Outline your monitoring process and tools you have developed or will develop to review environmental performance against targets and objectives on a regular basis making gender considerations and inclusive activities specific and clear.

- Fill in the following table and regularly monitor:

Environment action plan	Issues	Stakeholder affected (how men and women are differently affected)	Proposed (mitigation) activities indicating adaptations according to gender	Targets (sex disaggregated)	Status of initiative and gender inclusion
Energy use					
Natural resource use					
Water use					
Waste water discharge					
Air pollution (including greenhouse gas emissions)					
Waste management					
Adaptation to climate risks					
Regulation/corporate					
Health and safety					
Other					

Human resources/stakeholders

- Explain how women and men have been involved in moving forward on this initiative and consulted as activities have been rolled out

- Explain how women and men employees are/will be trained and educated on environmental issues and the environmental effects of their activities.

- Describe the environmental expectations that your business has in relation to external parties such as men and women suppliers and contractors.

- Describe your commitment to communicate your company's environmental aims and objectives also to women and men customers, investors, community members and other external stakeholders.

Conclusion

- Describe your company's commitment to continually improve your inclusive environmental performance and manage your environmental impact that considers the opinions, needs and effects on women and men stakeholders.

Appendix

- Include any gendered environmental assessment/monitoring tools that your company has already developed.

- Add any useful links and references.

Planning Tool: Indicators for Employee Diversity Performance Management System

Purpose	An example template that implementers can use to draft a company performance management system which tracks employee gender diversity.
User	Lead implementing organization of GEM strategies (e.g. company, investor, capacity builder)
Description	For many companies, implementing an employee diversity performance management system is a natural first step to supporting a more productive and inclusive workplace. This planning tool offers suggested gender disaggregated indicators to track as part of a staff performance management system. It also includes guidance on how to analyze data. Through regular monitoring and analysis of data, senior management can make informed decisions to develop a more gender balanced and equitable workforce.

Recruitment

Disaggregate the following indicators by department and job level

- # of women and men (w/m) job applicants
- # of w/m candidates shortlisted
- # of w/m employees hired
- # of w/m employees retained after probationary period

Promotion

Disaggregate the following indicators by employee performance score, department and job level

- # of w/m employees promoted
- # of w/m employees promoted by hiring manager

Attendance

Disaggregate the following indicators by department and job level

- # of sick days claimed by w/m employee annually
- # of w/m employee days worked annually

Retention

Disaggregate the following indicators by reason for exit (e.g. voluntary, termination), department and job level

- # of w/m employees who exited
- % of w/m employees retained
- % of w/m employee attrition
- Average amount of time in years that w/m employees have worked at the company

Performance

Disaggregate the following indicators by department and job level

- w/m employee performance indicators (dependent on the company e.g. sales volume, new client acquisition, customer satisfaction scores, department balanced budgets, new products developed/launched, etc.)

Compensation

Disaggregate the following indicators by department and job level

- Salaries paid to w/m employees
- Bonuses paid to w/m employees

Satisfaction

Disaggregate the following indicators by department and job level

- Satisfaction scores from w/m employee satisfaction survey
- w/m employee responses from confidential feedback system

Benefits

Disaggregate the following indicators by department and job level

- # of w/m employees using health services shared/linked by the company
- total expenses incurred to pay for w/m employee benefit plans annually

Engagement

Disaggregate the following indicators by department and job level

- # of w/m employees participating in volunteer opportunities
- # of w/m employees voluntarily attending at company/partner events

Guidance for analyzing employee diversity data

Analyzing indicator data can determine gender imbalances, issues in retention and promotion practices, opportunities to better meet employee needs, etc. Analysis may include, but is not limited to, calculating the proportion of women relative to men (e.g. comparing the # of women promoted / total women staff with # of men promoted / total men staff) or calculating ratios of men to women, as depicted in the table below.

It is recommended that senior management and other decision makers monitor indicator data regularly so that action plans can be developed and implemented to respond to trends observed in data.

Gender disaggregated data for recruitment process of junior staff (example)				
	Total	**Men**	**Women**	**Ratio of men to women**
# of job applicants	1985	1564	421	**4:1**
# applicants selected	670	599	71	**8:1**
# employees onboarded	266	245	21	**12:1**
# employees retained	229	215	14	**15:1**

Planning Tool: Basic Monitoring Plan

Purpose	To assist implementers in preparing a simple plan to monitor completion of activities that are part of GEM strategy implementation.
User	Lead implementing organization of GEM strategies (e.g. company, investor, capacity builder)
Description	The implementer completes this planning tool for activity monitoring by following the guidance below. Ideally, it is completed before starting implementation. Measuring activity indicators allows implementers and partners to continuously capture lessons learned and adapt implementation in response. Implementers track activity indicators on a monthly, weekly or daily basis.

Activity indicators and targets

Using the table below, define at least 10 activity indicators that measure the short to medium-term expected results of the GEM strategy. The time-line for achieving targets occur sometime during implementation. An example is provided below. Activity indicators are also known as output indicators. For measuring long-term results, refer to Step 6 – Impact Measurement.

Activity	Activity indicator	Baseline	Target
Staff from small business division training in advanced communication and negotiation skills	# female staff from small business division trained in advanced communication and negotiation skills	20 female sales reps	200 female sales reps
	# male staff from small business division trained in advanced communication and negotiation skills	100 men sales reps	200 male sales reps
	Average sales (USD) generated in the last quarter by a woman sales representative in small business division	50,000	75,000
	Average sales (USD) generated in the last quarter by a man sales representative in small business division	60,000	85,000

Guidance Tool: Facilitated Learning

Purpose	The purpose of a facilitated learning discussion is to share successes and issues in implementation, and to brainstorm possible solutions.
User	Lead implementing organization of GEM strategies (e.g. company, investor, capacity builder)
Description	A set of discussion questions to facilitate team learning during implementation. This guidance tool is a simple way to capture lessons learned. Discussions can be held monthly or weekly with the implementing team, and may include partner organizations. Data from activity indicators and monitoring will also inform discussions.

Discussion questions

1.	Are we completing activities relative to the workplan? If not, what is preventing or delaying implementation? How can we overcome barriers to implementation?
2.	How are women and men involved in implementation? Do they feel that they are contributing?
3.	What are the successes in implementation to date? (reflect on data received through activity monitoring and impact measurement, as well as the desired objectives in gender equality mainstreaming of ESG criteria)
4.	Why have we been successful?
5.	How are women and men benefiting from the successes?
6.	What are the current challenges in implementation? (reflect on data received through activity monitoring and impact measurement, as well as the desired objectives in gender equality mainstreaming of ESG criteria)
7.	How are women and men affected by the challenges?
8.	How can we overcome the challenges? What solutions and resources are available?
9.	What have we learned as a result of these successes and challenges?
10.	Is there anything that surprised us?
11.	Is there anything we should do differently?
12.	Given what we know now, are the upcoming planned activities still relevant?

Guidance Tool: GEM Next Steps

Purpose	After the implementation of GEM strategies is complete, it is important to reflect upon the implementation as a whole and determine the appropriate next steps for the company in GEM.
User	Company, investor, and capacity builder
Description	This tool builds on the facilitated learning tool and includes a set of discussion questions to help guide decision making on the next steps in gender equality mainstreaming. Key decision makers from the implementer and partners are engaged in this discussion.

Discussion questions

1.	What were the biggest achievements from implementing the GEM strategies?
2.	What were the greatest failures while implementing the GEM strategies?
3.	What were the key lessons learned from implementing the GEM strategies?
4.	Has company senior management been aware or involved in implementation?
5.	Has company senior management bought into the results achieved?
6.	Is there a desire to continue or expand existing GEM strategies? Is there support from women and men employees? From women and men senior managers? From the investor and board?
7.	Is there a desire to start new GEM strategies in the future? Is there support from women and men employees? From women and men senior managers? From the investor and board?
8.	What types of GEM strategies should be pursued in the future and why? (reflect on data received through activity monitoring and impact measurement, as well as the desired objectives in gender equality mainstreaming of ESG criteria)
9.	Are there resources available to continue, expand and/or start new GEM strategies?
10.	What will be done differently in the implementation of future GEM strategies?

Step 6 Impact Measurement

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
IDENTIFICATION	SCOPING ASSESSMENT	FULL ASSESSMENT	STRATEGY DEVELOPMENT	IMPLEMENTATION MONITORING & LEARNING	IMPACT MEASUREMENT

Measure the long-term impacts of gender equality mainstreaming initiatives and business operations.

The final step involves tracking the long-term gendered environmental, social and governance and financial impacts of GEM strategies and broader company operations.

What is Impact Measurement?

Impact Measurement is the act of evaluating the long-term impacts of GEM strategies and company operations. Through tracking key performance indicators (KPIs), Impact Measurement informs decision makers on whether GEM strategies and broader business activities are achieving the desired long-term gender equality and financial results. Generally, Impact Measurement assesses results that are expected to be achieved in six months or longer, especially since it can take years to shift women and men's attitudes and behaviours. Impact Measurement is different from monitoring and learning. It involves evaluating higher level outcomes like increased gender diversity at the senior management level. In contrast, monitoring and learning tracks short to medium-term results like the number of senior executives trained in gender diversity in leadership.

Guidance Tool: Developing GEM Key Performance Indicators

Planning Tool: Impact Measurement Plan

What can Impact Measurement be used for?

- Implementers, such as **companies, investors, capacity builders** can use Impact Measurement to track the expected (and unexpected) long-term impacts of a GEM strategy.

- **Companies** can track gendered ESG and financial KPIs on an ongoing basis to continuously measure a company's progress towards gender equality. For example, a business may monitor gender disaggregated data on leadership, recruitment, promotions, customers, and environmental impacts. Measuring and reporting on impact KPIs can be attractive to external **investors**.

- **Investors** can use Impact Measurement for ongoing portfolio monitoring. By identifying a limited number of gendered ESG KPIs to track across investee companies, investors can gain an overall picture of portfolio performance in gender equality mainstreaming.

- **External evaluators** can complete impact assessments of company GEM strategies to provide **funders** or **investors** assurance that targeted long-run outcomes were achieved.

> The online GEM self-assessment tool is a simple way for companies to measure their gender equality mainstreaming impact annually. It generates a company gender score for each ESG area.
>
> Access the GEM self-assessment at https://www.meda.org/self-assessment.

Who can conduct Impact Measurement?

The lead implementer is typically the organization responsible for Impact Measurement. However, supporting partners (e.g. investor, capacity builder, technical expert, funder) have a significant stake in the process and outcomes of Impact Measurement. For example, an investor will want to know whether the GEM strategies led to greater gender equality and superior financial results. Using external evaluators to measure impact can add significant credibility to reported results.

Self-Guided Company

A company may choose to conduct Impact Measurement independently. Step 6 (described above) provides guidance to do so. As resources permit, the company can engage technical experts, investors, and other key stakeholders, who can offer valuable input into the development of impact measurement plans, as well as feedback on impact measurement findings.

Guidance Tool: Developing GEM Key Performance Indicators

Purpose	To guide implementers on how to develop relevant and informative gender equality mainstreaming key performance indicators.
User	Lead implementing organization of GEM strategies (e.g. company, investor, capacity builder)
Description	This tool defines Key Performance Indicators (KPIs) and GEM KPIs and why implementers and partners use them. The tool offers ten guidelines for developing strong GEM KPIs.

What is a KPI and why use KPIs?

KPIs are signals of achievement or change related to an expected result. KPIs are limited in number so that decision makers receive only the most relevant data at the lowest cost. Used to measure both qualitative and quantitative results, KPIs are essential for senior managers to make informed decisions on business strategy.

What is a GEM KPI?

GEM KPIs determine whether company operations and GEM strategies positively contribute to women's empowerment and greater gender equality. As such, these KPIs measure the financial and gendered ESG impacts of GEM strategies and the firm. Measuring gendered ESG impacts means gender disaggregating data to determine the amount to which women and men participated in, contributed to, and benefited from financial and ESG results. If a GEM strategy has achieved strong ESG results for women and men, the company can expect the strategy to be contributing towards improved gender equality. The table on the following page provides examples of non-gendered KPIs applied in the conventional ESG standard, and gender inclusive ESG KPIs used to measure GEM strategies.

ESG area of focus	Example conventional ESG KPI	Example GEM KPI
Environmental	Number of environmental policies that benefit the local community	Number of women and men community members who contributed to the development of environmental policies. For example, an environmental policy takes additional steps to engage women community members who are frequently excluded from land-use decisions because they often lack land rights
Social	Number of job applicants and employees hired	Number of women and men applicants, shortlisted and hired by job level, department and hiring manager
Governance	Number of qualified and functional board members	Number of qualified women and men board members contributing to effective governance

Top 10 guidelines for developing GEM KPIs

1 **Define the user**
Understanding who will use the data ensures that GEM KPIs stay informative and decision-useful. For example, a senior HR manager can track a GEM KPI that measures the proportion of female promotions relative to total promotions, by hiring manager. Analyzing this KPI can help the HR manager uncover gender biases in specific hiring managers.

2 **Align with industry standards**
Using established impact measurement standards enable companies to benchmark performance and simplify and standardize reporting. The Global Impact Investing Network's IRIS catalogue, UN Principles of Responsible Investment, and Sustainable Development Goals offer standards in impact measurement. However, many standard impact metrics do not take gender impacts into account and therefore need to be revised. Questions from ⧉ Interview Tool: Scoping Assessment in Step 2 and ⧉ Interview Tool: Full Assessment in Step 3 are resources for gendered ESG KPIs.

3 **Engage women and men stakeholders**
Engaging both women and men as employees, investors, technical experts, and other stakeholders increases the quality and sense of ownership for GEM KPIs.

4   **Measure financial and gendered ESG impacts**
Measuring financial KPIs related to GEM strategies is imperative. It builds the business case for companies to continue and expand GEM strategies. In addition, analyzing gendered ESG KPIs alongside financial KPIs can uncover hidden relationships. For instance, a company may find that women sales representatives are exceeding monthly sales targets more often than men, but women are receiving fewer promotions at senior levels of the sales department.

5   **Prioritize materiality**
Select GEM KPIs that are the most material to the business. Material KPIs are those most significant or relevant to the company's operations. Materiality is informed by a company's sector, geography, size, etc.

6   **Ensure KPIs are SMART**
GEM KPIs are *Specific* to women and men, *Measurable* by women and men, *Attainable* by women and men, *Relevant* for women and men, and *Trackable* by women and men (UNDP, 2009).

7   **Include standard and custom KPIs**
Standard and custom GEM KPIs provide different and complementary data (Dildar, 2017). Standard GEM KPIs assist a company with benchmarking and comparing to peers (see second point on industry standards above). In contrast, custom GEM KPIs are tailored specifically to company operations and GEM activities. As a result, custom KPIs are more relevant and decision-useful to implementers but are not as comparable with competitors.

8   **Disaggregate data by gender**
Disaggregating data by women and men is key to understanding the different ways in which women and men are participating, contributing and benefiting from GEM strategies and company operations.

9   **Measure long-term results**
Companies measure short-term performance of GEM strategies through activity indicators defined in the workplan (see planning tools in Step 4 – Strategy Development and Step 5 – Implementation, Monitoring & Learning). The expected long-term results of GEM strategies, such as improved women's empowerment and financial performance, are measured by GEM KPIs over several years.

10   **Minimize the number of KPIs**
While measuring GEM KPIs is important, they should not be too onerous for companies to collect (Dildar, 2017).

Planning Tool: Impact Measurement Plan

Purpose	To assist implementers in preparing an impact measurement plan to track long-term impacts of GEM strategy implementation or overall company operations.
User	Lead implementing organization of GEM strategies (e.g. company, investor, capacity builder)
Description	The following template is an impact measurement plan for measuring GEM KPIs. An example is provided below in italics. The example expected result and GEM KPIs are based on implementing a customer service and confidence training for employees. This template is based on the Performance Measurement Framework used by Global Affairs Canada.

STEP 6: IMPACT MEASUREMENT

Expected result	Key performance indicator	Baseline data	Targets	Data sources	Data collection methods	Frequency	Responsibility
Improved capacity of employees to deliver superior customer service	Percentage of women and men employees reporting change in confidence	0% 0%	80% women employees report increased confidence 80% men employees report increased confidence	Women and men employees	Self-evaluation survey	Ongoing; immediately following Customer Service & Confidence training	External training specialist
	Customer satisfaction scores, disaggregated by women and men employees	3.5/5 for women employees 3.7/5 for men employees	4/5 for women employees 4/5 for men employees	Customers	Customer satisfaction survey	Ongoing; immediately following interaction with customer	Company Customer Services Senior Manager
	Percentage of customer referrals, disaggregated by women and men customers	25% of women customers 20% of men customers	40% of women customers make a referral 40% men customers make a referral	Customers	Customer registration form	Ongoing	Company Customer Services Senior Manager
	Perception of stakeholders regarding employee confidence and customer service skills	Not applicable	Majority of stake-holders interviewed speak positively about the training's contribution to employee confidence and customer service skills	Women and men employees Women and men managers	Focus Group Discussions	Monthly	External training specialist

Appendix A
Additional
Resources

Additional Resources for GEM in Environmental, Social and Governance

Gender equality mainstreaming in environmental

- Global Gender and Climate Alliance Gender and Climate Change: A closer look at existing evidence

- SASB Materiality Map[3]

- Global Impact Investing Network IRIS Catalogue Environmental Indicators[4]

- Women's Environment and Development Organization website

- MEDA Equator Kenya SME case study

- New Course website

Gender equality mainstreaming in social

- Australian Government Gender Strategy Toolkit

- Global Impact Investing Network IRIS Catalogue Gender Indicators

- UN Women Women's Empowerment Principles and Gender Gap Analysis Tool

- Acumen Women and Social Enterprises: How Gender Integration can Boost Entrepreneurial Solutions to Poverty

- National Integration Working Group for Workplaces Managing Workplace Diversity – A toolkit for organizations

- Women's World Banking Promoting Women's Leadership

- Cranfield University Linchpin – Men, middle managers and gender inclusive leadership

- McKinsey Women in the Workplace

- Pax World Management 5 Ways to Promote Women's Leadership in Your Company

- Male Champions of Change In the Eye of the Beholder – Avoiding the Merit Trap and other resources by Male Champions of Change

- PWC Winning the fight for female talent – How to gain the diversity edge through inclusive recruitment

- Harvard Business Review How to reduce unconscious bias in hiring process

- Gender Decoder for Job Ads

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[3] Note, environmental indicators are not gender disaggregated. Using Guidance Tool: Developing GEM Key Performance Indicators in Step 6, these indicators can be gendered.

[4] Ibid.

Appendix A: Additional Resources

- Gender Practitioners Collaborative Minimum Standards for Mainstreaming Gender Equality

- McKinsey Women Matter: Reinventing the workplace to unlock the potential of gender diversity

- Women's World Banking Women's Workforce Participation and Advancement in Southeast Asia

- Diversity & Inclusion Asia Network Diversity & Inclusion: Building the Business Case – Stories from India

- Better Work Indonesia Guidelines on the Prevention of Workplace Harassment

- EDGE Certification

- Criterion Institute Toolkit for Gender Lens Investing

- Lean In Circles

- League of Allies Helix line and League Seals of Approval

- UN Women The Power of Procurement: How to source from women-owned businesses

- Business for Social Responsibility Gender Equality Codes of Conduct Guidance

- WEConnect International website

- Oak Foundation The business case for women's economic empowerment: an integrated approach

- World Economic Forum The Global Gender Gap Report

- IFC Invest in Women: new evidence for the business case

- McKinsey The Power of Parity: How Advancing Women's Equality Can Add $12 Trillion to Global Growth

- United Nations Foundation A Roadmap for Promoting Women's Economic Empowerment

- Deloitte The gender dividend: Making the business case for investing in women

- Ernst & Young Women. Fast Forward. The time for gender parity is now

- Grand Challenges Canada Implementing Grand Challenges Canada's Gender Strategy

- BNY Mellon Return on Equality. Investment opportunities that help close the global gender gap

- Harvard Business Review The Female Economy

- Forbes Top 10 Things Everyone Should Know About Women Consumers

- Bloomberg Financial Services Gender-Equality Index

- Women's World Banking Gender Performance Initiative

- IFC Roshan Inclusive Business Case Study

Gender equality mainstreaming governance

- MSCI Women on Boards Global Trends in Gender Diversity on Corporate Boards

- Deloitte Women in the boardroom – A global perspective

- The World Bank Women, Business and the Law

- Catalyst Women on Corporate Boards Globally

- The 30% Club

- Government of Canada Women on Boards: A Competitive Edge

- Australian Government Gender Strategy Toolkit

- Global Impact Investing Network IRIS Catalogue Gender Indicators

- Credit Suisse Gender diversity and corporate performance

- Harvard Business Review CEOs Explain How They Gender-Balanced Their Boards

- International Labour Organization Women in business and management: gaining momentum in Asia and the Pacific

- UN Women Women's Empowerment Principles and Gender Gap Analysis Tool

- Bloomberg Financial Services Gender-Equality Index

- Gender Practitioners Collaborative Minimum Standards for Mainstreaming Gender Equality

- Catalyst Women Director Database

Appendix B
GEM Case Studies

Company overview

Macrosentra Niagaboga (MN) is part of Cimory Group, a family business in Indonesia. MN distributes over 500 needed consumer goods including dairy, processed meats, eggs, and soy products across the archipelago. Founded in 2004, MN has 614 employees with 174 women staff.

## Gender equality mainstreaming in environmental, social and governance

With support from USAID, Mennonite Economic Development Associates (MEDA) awarded MN USD $40,000 in technical assistance support to mainstream gender across all dimensions of the Environmental, Social and Governance (ESG) standard. MN had three goals as part of the initiative:

1. Develop an employee diversity performance management system. This database would track sex disaggregated human resources data to allow managers to identify gender imbalances within various departments and levels of the company.

2. Establish a career development program including a focused career track to support women to move upwards in the organization.

3. Create and implement a first-ever training program for staff, ensuring gender is mainstreamed across training modules as well as taught as a standalone component.
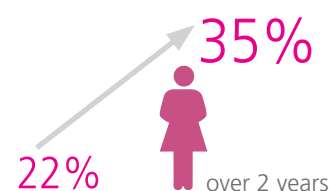
Results achieved

MN developed a database that tracks sex disaggregated data for the number of new recruits and active employees, and also analyzes promotions, retention, absenteeism, and resignations by women and men. Using the database, management learned that women outperform men, especially at lower level positions, which should help support women to progress up company ranks. To complement the database and support increased transparency, MN prepared clear guidance on the

requisite experience and competencies for both women and men employees to be eligible for future promotions. The newly established career track for women included a mentorship program where interested employees will have biweekly mentorship sessions with their line managers to expand their growth opportunities within the company. Finally, MN launched its first-ever training program for staff, training 402 employees in induction and career development, 398 employees in gender awareness, and 241 employees on gendered division-specific topics ranging from HR, sales, finance, and procurement.
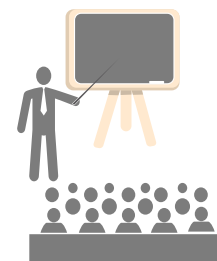
Expected gendered ESG and financial impacts

MN's executive leadership expressed a desire to continue gender mainstreaming initiatives as long as they align with business strategies. MN believes that the combination of gendered training materials and clear competencies outlined for all positions will lead to better recruitment, retention, promotion, and capacity building approaches, resulting in greater representation of women throughout the company. For instance, MN has set targets to increase their total workforce from 22% women staff to 35% over the next two years. Ultimately, as industry studies show, strengthening MN's female and male workforce should drive financial performance including sales and profitability.

35%

22% over 2 years

Lessons learned

Technical support from local consultants and MEDA staff was instrumental for MN to achieve quality results for their staff. MN recognized that they did not have the necessary capacity to accomplish their goals in-house. MN proactively hired a senior female human resources (HR) gender consultant with previous experience as a CEO of a consumer goods business similar to MN. In addition to offering relevant experience and advice, she became a role model for MN's female employees as a woman business leader. Also, since establishing a sex disaggregated HR database was novel to MN, MEDA supported MN by helping create the vision for such a tool and demonstrating how to analyze data to facilitate data-driven decisions. MN's senior management have since established an action plan to conduct quarterly reviews of sex disaggregated data to make more informed hiring and promotion decisions that improve gender equality at MN.

About the Gender Equality Mainstreaming (GEM) pilot

Under the USAID Asia and Middle East Economic Growth Best Practices Project, MEDA partnered with local investment funds and small and medium enterprises (SMEs) to evaluate and upgrade gender equality within business operations by mainstreaming gender across the environmental, social and governance (ESG) standard commonly applied in the investment industry.

Company overview

Established in 2013, Portea is a leading health care provider in India. Portea serves more than one million patients through a home-based care model. Most of Portea's services, which span elder care, physiotherapy, post natal mother and child care and more, are delivered by low-income male and female nursing attendants (NAs) and nurses. Portea has almost 4,000 employees with women representing about 52% of the workforce, especially at lower levels.

## Gender equality mainstreaming initiative in environmental, social and governance standards

With support from USAID, Mennonite Economic Development Associates awarded Portea USD $40,000 in technical assistance support to mainstream gender across all dimensions of the Environmental, Social and Governance (ESG) standard. With the goal to improve staff retention and customer satisfaction, Portea launched a series of trainings for women and youth NAs and nurses to boost their self-confidence and skills:

1. In-classroom training on a newly developed Happiness Module. Topics included self-esteem, self-care, and self-confidence along with practical tips on grooming and good posture.

2. Emotional intelligence and financial management training delivered through Interactive Voice Response (IVR) technology.

3. On-the-job training (OJT) focused on work-life balance and infection control.

Results achieved

In a span of four weeks, Portea delivered trainings to 2252 nursing aides and nurses (1440 women and 812 men). NAs – including new recruits from disadvantaged communities in Odissa and Assam – spoke very highly of the Happiness training, with many left feeling like they have "more inside them than they knew." Some expressed that they viewed themselves differently after the training, felt more confident speaking out in front of others, and realized the value of the work that they

offered their patients. On average, participants' self-reported confidence levels jumped from 2.8 before the workshop to 4.1 after on a 5-point scale. NAs said this increased self-confidence will help them be more pro-active when they are uncomfortable with a situation or need to protect themselves. Through IVR and OJT, satisfactions scores were very positive, averaging around 4.3 on a 5-point scale. Participants appreciated how the OJT emphasized that their own holistic health is paramount to providing quality patient care.
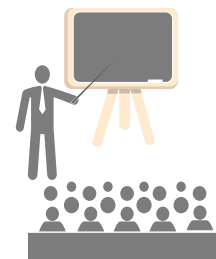
Expected gendered ESG and financial impacts

Portea will continue delivering trainings to support the empowerment of NAs and nurses, even after grant support is completed. Ultimately, Portea expects the initiative to improve retention for male and female staff, increase female and male customer satisfaction and referrals, and contribute to revenue growth. Incidentally, this important service will contribute to women's empowerment by allowing them to remain in or enter the workforce when they would otherwise have had to stay home to care for the sick and elderly.
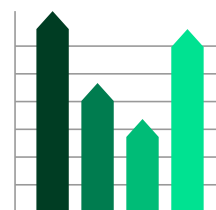
Lessons learned

Portea is led by a female CEO and one third of board positions are held by women. The female leadership supported the positive outcomes achieved for NAs and nurses. Despite these achievements, gender equality can still be improved at Portea. For example, leadership believed that gender equality is "in reverse" at Portea; however, data indicates otherwise since most women work at lower levels of the company. Moreover, it is unclear to NAs and nurses how to advance within the company, an area that should be improved upon in future gender mainstreaming initiatives, and Portea is eager to do so given company growth objectives and the need to advance patient care staff to supervisory roles.

About the Gender Equality Mainstreaming (GEM) pilot

Under the USAID Asia and Middle East Economic Growth Best Practices Project, MEDA partnered with local investment funds and small and medium enterprises (SMEs) to evaluate and upgrade gender equality within business operations by mainstreaming gender across the environmental, social and governance (ESG) standard commonly applied in the investment industry.

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