TOOL 1.9

Establish a Gender Equity Strategy

- » **GOAL:** Develop a strategic roadmap for how your company will create a gender-equitable work environment across the company
- » **TARGET UNITS:** Senior Management, Training, Human Resources, Gender Equity Champion

Gender Strategy and Gender Policy: Setting the Scene for Gender Equity

This tool provides guidance on developing a gender equity strategy that builds on the gender policy outlined in **TOOL 1.8**. The gender strategy is a programmatic document, outlining how your company will achieve its gender equity targets; the gender equity policy is an important piece of this strategy and is the set of corporate rules that will guide corporate decisions and employee action. The strategy is a dynamic document which can be updated and adapted, but includes the guiding plan for how to meet gender targets, including specific steps such as setting targets, outlining the common set of rules and expectations for all staff regarding gender equity (the policy), as well as any other programs that will be implemented (training, communications, monitoring, etc.) to help the company achieve its goals. The policy, on the other hand, should be established as a fixed set of principles that the company and staff rely on to guide decisions.

Establishing the Gender Equity Strategy

The gender equity strategy is the foundation for any gender diversity improvement initiatives. It provides the structure for gender equity commitments, actions, and progress monitoring. The strategy should be a flexible, dynamic document that lays out a company's goals for gender equity, identifies how those goals will be met, coordinates activities, and clarifies accountability. It should frame clear targets, time-bound goals, and the pathway towards those goals, based on the findings from the gender audit. The strategy should be linked to the business case by detailing a concrete set of actions and the associated theory of change that will help the company address shortcomings identified in the gender assessment and realize the gains outlined in the business case. A comprehensive gender strategy can help companies to achieve:

- **Unified vision:** A strong gender strategy provides a clear set of objectives and values that the company can aim for. A clear, common, and communicated vision facilitates actions towards that goal, accountability for progress, and coordination between different parts of an organization. This can help ensure that all units are working towards the same goal and hold to the same standard. It also enables teams to learn from others' experiences.

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- **Consistency of approach:** A defined strategy ensures that teams are adopting the same goals and techniques. When several approaches are being piloted, all units can learn from the experience.
- **Motivation and momentum:** A strategy that includes incentives and monitoring can help motivate organizations to meet their goals.
- **Identify progress:** A strategy that includes specific goals provides a framework to measure progress and determine needed course corrections. Such information is especially important for companies required to report to investors and stock exchanges.

Developing a Gender Equity Strategy

What follows is a step-by-step guide to developing a gender equity strategy.

Step 1: Appoint the gender champion and develop a gender task force.

The first step in developing a gender strategy should be to get the human resource infrastructure in place to develop and implement the strategy. This should include the gender champion and a gender task force. More details on the roles and responsibilities of the gender champion and the gender task force are in **TOOLS 1.10 (Terms of Reference for a Gender Equity Champion)** and **1.15 (Creation of a Gender Task Force and Terms of Reference)**, but the gender champion should take the lead on development and implementation of the strategy if the role is a full-time one. Where a dedicated position such as the gender champion is not feasible, the part-time gender champion should still work closely with HR and senior management on the development and implementation of the strategy. The gender task force should provide input on the strategy, as well as support communication and dissemination of the strategy to general staff.

Step 2: Set company-wide goals for gender equity and diversity.

Based on the gender audit, the employee scorecard, and any other assessments conducted, the next step in developing a gender strategy is to identify the priority areas and related goals, which are a precursor to more specific gender targets and should focus on the company's vision for gender diversity. The goals should reflect the key issues that staff identified through the audit and scorecard. Where staff ideas outstrip capacity for action, management may prioritize by using the business case to identify priority areas with the greatest business impact. To further help prioritize goals, there are several additional key considerations to keep in mind. First, identify priority areas for your company. While all are important, rank them in order of importance. Several factors could influence this prioritization, such as which areas require the most improvement, or where improvement will have the greatest business impact. Use Table 1D to help you rank priorities: High (H), Medium (M), or Low (L).[61]

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[61] Adapted from: Australian Government Workplace Gender Equality Agency, Gender Strategy Toolkit, Sydney: Australian Government, 40.

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Next, rate company progress. Rate each area, on a scale of 1–5, in terms of how well gender-equity principles have been integrated.

Finally, examine the table to compare priority areas with areas of greater or lesser progress. Are there high-priority areas with poor performance to date? Are there unexpected gaps or areas that need improvement? Discuss with the task force how to prioritize key areas.[62]

TABLE 1D | Ranking Gender Diversity Priorities

POTENTIAL PRIORITY AREAS	PRIORITY RATING	PROGRESS TO DATE
Gender Equity throughout the Workforce		
Gender Equity in Recruitment		
Gender Equity in Promotions		
Women's Representation in Leadership and Management		
Gender Pay Equity		
Gender Inclusive Culture		
Equity of Training and Professional Development Opportunities		
Family-Friendly Work Environment		
Management Accountability for Gender Equity		
Gender Inclusion in Monitoring and Reporting		
Gender Mainstreaming in Policies and Processes		
Gender Equity in Procurement/ Supply Chain		
Gender Inclusion in Community Engagement		
Investment in a Diverse Talent Pipeline		

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[62] Ibid, 39.

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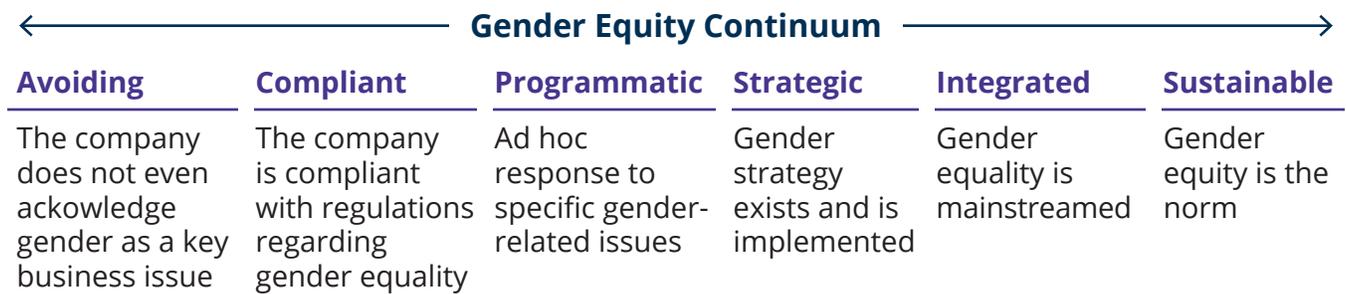
Step 3. For priority goals, set specific targets.

Based on Step 2, identify key gender equity targets for each priority goal (see **TOOL 1.12** for guidance on target setting). Develop draft targets to align with key corporate goals.

Figure 1C below is a "Gender Equity Continuum." It can help you set targets as well as measure the integration of gender issues and the extent to which they are considered. By identifying your current spot along the continuum, you can set targets to move from one stage to the next—for instance, from *Compliant* to *Integrated*—over a set time period.[63]

FIGURE 1C | Gender Equity Continuum

Gender Equity Continuum

Avoiding	Compliant	Programmatic	Strategic	Integrated	Sustainable
The company does not even ackowledge gender as a key business issue	The company is compliant with regulations regarding gender equality	Ad hoc response to specific gender-related issues	Gender strategy exists and is implemented	Gender equality is mainstreamed	Gender equity is the norm

Step 4: Validate goals and targets.

Goals and targets should be discussed and validated with management and relevant business units to ensure widespread understanding, support, and buy-in for the goals.

Here is a set of indicators to guide your implementation of a gender equity strategy. Originally developed by IFC in collaboration with Lonmin for the publication *Women in Mining: A Guide to Integrating Women in the Workforce*, they are reprinted in Table 1E.[64]

> A gender equity strategy is a dynamic document that includes the **guiding plan for how to meet gender targets**, outlining the common set of rules and expectations for all staff regarding gender equity (the policy), as well as any other programs that will be implemented (training, communications, monitoring, etc.) to help the company achieve its goals.

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[63] Australian Government Workplace Gender Equality Agency, Gender Strategy Toolkit, 39.
[64] IFC and Lonmin, *Women in Mining: A Guide to Integrating Women into the Workforce*, 17.

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TABLE 1E | Model Gender Equity Strategy Targets

	MANAGERS	ENGINEERING	MEDICAL	HUMAN RESOURCES	TRAINING/ CULTURE CHANGE/ COMMUNICATIONS
Outputs		» # of change houses built » # of underground toilets installed » # of appropriate safety equipment issued	» # of jobs assessed for women	» # of policies developed/ updated » # of women assisted with childcare	» # of hours training provided on gender bias » # of participants in trainings and workshops » # of people reached through communications efforts
Outcomes	» # of women employed by the company » % of women employed by the company » Female vs. male attrition rates				
Anticipated Impacts	» Compliance with government legislation » Increase in income of women, thereby impacting community wellbeing » Improved safety record due to hiring of women » Improved machinery care record due to hiring of women				

Step 5. Outline gender equity strategic action plan.

Based on the key goals and targets identified, identify key categories/types of activities that will be undertaken to meet the stated targets. At this stage, the action plan does not need to be in final detail, but it should follow a theory of change model—this can incorporate the targets set in Step 4 and should outline the issue, the action, the expected outcome, and the expected impact. This outlined plan will state what the company's key gender priorities are, what it intends to do about them, and how these actions are anticipated to bring about the desired results. In addition to this theory of change as the 'meat' of the plan, the strategy document should include the following sections:[65]

• **Introduction/context:** This section should outline the key gender mainstreaming goals, the business case behind these objectives, a summary of diagnostics, and the company's current status on meeting these goals.

• **Key focus areas:** For each focus area, identify the goals that have been set, anticipated actions to reach these goals, roles, responsibilities, and accountabilities for key activities, factors that would support or threaten success, and how progress will be measured. See Table 1F for an example of how to structure action planning for each focus area.

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65 Australian Government Workplace Gender Equality Agency, *Gender Strategy Toolkit*, 42.

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- **Consolidation of approaches by business unit:** Different teams within an organization may have different roles to play across various focus areas. For instance, while HR may be the primary actor on increasing gender in recruitment, the communications team may also have a role to play in shaping how recruitment messaging is put out to potential applicants. In addition to organizing the strategy by focus area, also include an outline of specific tasks by business unit, which may cross multiple focus areas.

- **Monitoring, consultation, and timeline review:** Ensure that business units are aware of how and when progress will be monitored, as well as when the plan will be reviewed, tweaked, and updated to support continued progress. Strategies should be living dynamic documents, with set periods for review and adjustment.

- **One-page summary of the gender equity strategy:** This will enable easy dissemination. Share the summary with all teams and make sure that they understand their responsibilities, accountability, and opportunities for input and revision. Based on the overall strategy, individual business units can develop their own implementation strategies.

Once the strategy is complete, the company's gender equity champion should develop and implement training on the strategy for all staff across the organization. This will familiarize staff with the strategy and reinforce corporate objectives and commitments, as well as the role each business unit is expected to play.

TABLE 1F | Example of a Gender Equity Strategy Outline

KEY FOCUS AREA	Recruitment
PROBLEM TO ADDRESS	Too few women applicants
ANTICIPATED ACTIONS	Coordinated outreach to local training institutions, improve gender inclusiveness of recruitment materials, provide coaching for potential female job applicants
DESIRED OUTCOME	Increased number of female applicants
DESIRED IMPACTS	At least 20 percent of job shortlist candidates are women
RESPONSIBLE UNIT	Human Resources and business units
TIMEFRAME	Effective immediately
MEASURING PROGRESS	Quarterly review of total applicants, shortlists, and final candidates
STRENGTHS AND THREATS TO SUCCESS	Strengths: Improved outreach activities, and gender-inclusive recruiting can support success; Threats: Lack of female candidates
RESOURCES NEEDED *(such as financial, staff time)*	Budget, staff time, consultants

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