



TOOL SUITE 1

UNLOCKING OPPORTUNITIES FOR WOMEN AND BUSINESS
A Toolkit of Actions and Strategies for Oil, Gas, and Mining Companies

INCREASING GENDER DIVERSITY FROM THE WORKFORCE TO THE BOARDROOM



**UMBRELLA FACILITY
FOR GENDER EQUALITY**



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A Toolkit of Actions and Strategies for Oil, Gas, and Mining Companies

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Tools to help companies address gender gaps on boards, in senior management, and in the workforce



Creating Markets, Creating Opportunities



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ABBREVIATIONS AND ACRONYMS

ARPEL Regional Association of Oil, Gas, and Biofuels Sector Companies in Latin America and the Caribbean

ASM Artisanal and Small-Scale Mining

(PNG) BCFW Papua New Guinea Business Coalition for Women

BIAC Business and Industry Advisory Committee to the OECD

CEO Chief Executive Officer

EI Extractive Industries

FIFO Fly-In, Fly-Out

FSV Family and Sexual Violence

GBV Gender-Based Violence

GDP Gross Domestic Product

GRM Grievance Redress Mechanism

HIV Human Immunodeficiency Virus

HR Human Resources

HREOC Australian Human Rights and Equal Opportunity Commission

HQ Headquarters

IFC International Finance Corporation

IPV Intimate Partner Violence

KDP Kecamatan Development Project

KPIs Key Performance Indicators

MOB Men-Owned Business

NGOs Non-Governmental Organizations

OECD Organization for Economic Cooperation and Development

OGM Oil, Gas, and Mining

PNG Papua New Guinea

RFX Summary acronym that includes Request for Information (RFI), Request for Proposal (RFP), Request for Quote (RFQ), and Request for Bid (RFB)

ROI Return on Investment

RTMP Rio Tinto Management Peru

SEC US Securities and Exchange Commission

SH Sexual Harassment

STEM Science Technology Engineering and Mathematics

TOR Terms of Reference

UNGC United Nations Global Compact

WGEA Australia's Workplace Gender Equality Agency

WEP Women's Empowerment Principles

WOB Women-Owned Business

APPLICABLE IFC PERFORMANCE STANDARD

Performance Standard 2. Labor and Working Conditions

This standard covers working conditions, protection of the workforce, operational health and safety, third party workers and workers involved in the supply chain. With regard to gender, it promotes non-discrimination and equal opportunity, health and safety of the workforce, protection of potentially vulnerable workers. It applies to workers directly engaged by the client (direct workers), workers engaged through third parties to perform work related to core business processes of the project for a substantial duration (contracted workers), as well as workers engaged by the client's primary suppliers (supply chain workers).

OVERVIEW: Gender Diversity and Inclusion in the OGM Workforce

The oil, gas, and mining industries have traditionally been male dominated. According to a study by Pricewaterhouse Coopers, women comprise only 10 percent of the global mining labor force and hold only 5 percent of positions at the top 500 mining companies.¹

Despite growing evidence of the business and development benefits—and clear business arguments—for increasing gender diversity and inclusion at all levels of oil, gas, and mining companies, women continue to be underrepresented in the OGM workforce.

Tool Suite 1 presents the business case for improving gender diversity in the OGM workforce, management and leadership, from the boardroom and C-suites down into the mineshaft. It includes tools to help companies:

- Assess strengths, weakness, and opportunities for increasing women’s engagement
- Improve gender equity in recruitment, retention, and promotion of employees
- Monitor and evaluate initiatives and promote sustainability.

THE BUSINESS CASE FOR GENDER DIVERSITY AND INCLUSION IN THE OGM WORKFORCE AND MANAGEMENT

This section makes the case for gender diversity at all levels of the OGM workforce, beginning at the very top.

The Value of Gender-Diverse Boards

Gender-diverse boards yield multiple benefits for OGM companies. Boards that include a better balance of men and women, as well as the full range of complementary skills and experience, add significant value, highlighted below:

- **Increased profitability:** Evidence shows that increasing gender diversity on boards is correlated with improved performance, profitability, and rising investor confidence. In 2014, non-profit organization Catalyst found that among a broad range of companies, those with female

¹ PwC, *Mining for Talent: A Study of Women on Boards in the Mining Industry* by WIM (UK) and PwC, London: PwC, 2013, 4.

board members have higher returns on equity, sales, and invested capital.² Another study, by the American Chamber of Commerce in France and the Business and Industry Advisory Committee to the OECD (BIAC), revealed that among U.S. Fortune 500 companies, those with the highest number of female board members outperformed those with the lowest, as measured by 53 percent higher returns on equity.³

- **Improved board performance:** Boards with greater gender diversity and inclusion also show greater accountability, increased and improved governance—as measured by the amount of time spent on audit and governance functions, and the presence of more effective board procedures—and improved collaboration and inclusion.⁴ Increased gender diversity on boards increases compliance with national and international conventions and regulations, and strengthens corporate accountability to the public.⁵

This performance difference may stem from the differences in men’s and women’s leadership styles, and/or from different ways in which men and women come to hold board positions. Whereas men are often hired through social networks that are formed in academic, social, and professional settings, women often lack access to these networks. Embeddedness in, and accountability to, these networks may make men less likely to hold colleagues accountable or confront them for performance issues, while women may have fewer reservations.⁶

- **Increased attractiveness of the sector to women:** There is a positive correlation between the number of women at the board level in an industry and how attractive women find that

“Organizations that [have greater gender diversity] are seeing better bottom line results because they fish from a bigger pool of talent, thereby accessing a deeper level of knowledge and leveraging those resources throughout the business value chain for better business outcomes... Organizations with more diverse talent pools, especially at senior levels, manifest a workplace culture of openness, merit and rational decision making that benefits the bottom line.”

Source: AmCham France and BIAC, “Putting all our Minds to Work: Harnessing the Gender Dividend.”

² Deloitte, “Towards Gender Parity: Women on Boards Initiative,” 2016, <https://www2.deloitte.com/au/en/pages/economics/articles/toward-gender-parity-women-on-boards-initiative.html>.

³ American Chamber of Commerce in France and BIAC, “Putting all our Minds to Work: Harnessing the Gender Dividend,” Paris: BIAC, 2012, 8.

⁴ See: Rebecca, Walberg, “How to Improve Boardroom Diversity without Resorting to Quotas of Tokenism?” *Financial Post*, October 6, 2014; Workplace Gender Equality Agency, “The Business Case for Gender Equality,” Canberra: Australian Government, 2013; IFC, *SheWorks: Putting Gender Smart Commitments into Practice*, Washington, DC: IFC, 2016, 15.

⁵ GRI and IFC, *Embedding Gender in Sustainability Reporting – A Practitioner’s Guide*, Washington, DC: IFC, 2009, 5.

⁶ Walberg, “How to Improve Boardroom Diversity without Resorting to Quotas of ‘Tokenism?’”

industry. So, having more women on the board can also help companies reap the benefits of greater gender diversity.⁷ This may be because of the presence and availability of women mentors and because women feel greater potential for recognition and advancement when the example of gender diversity is set publicly and prominently at the board level.⁸

- **Increased investor interest and growing requirements for gender diverse boards:** Increasingly, global investors are requiring companies to be more transparent in showing their efforts to build gender-diverse boards and in disclosing gender-related information. The U.S. Securities and Exchange Commission (SEC) now requires companies to disclose whether and how the nominating committee “considers diversity in identifying nominees” for directorships.⁹ Since 2015, the Australian Institute of Company Directors (AICD) has advocated for boards to include at least 30 percent women, and have called on Australian Stock Exchange (ASX) 200 companies to meet this target by 2019. As of 2010, the ASX Corporate Governance Council calls on companies to either outline their boards’ gender objectives, progress towards these objectives, and the gender diversity proportion of board directors and senior managers in annual reports or provide an explanation for why this information is missing.¹⁰ This focus is not limited to board-level diversity. In fact, indices such as the Calvert Responsible Index Series, the Pax Global Women’s Leadership Index, Pax Ellevest Global Women’s Index Fund, and the BUY UP index allow investors to use a range of key metrics with regards to gender diversity and leadership as investment criteria.

“The Top 20 organizations in the BusinessWeek Best Companies for Leaders are twice as likely to have more women in senior leadership positions.”

Source: BusinessWeek Online, “Women Leaders: The Hard Truth About Soft Skills”

The Value of More Gender Diversity in Senior Management

As with more gender-diverse boards, there are a number of reasons that greater diversity in the ranks of senior management is a good thing.

- **Improved financial performance:** According to Deloitte and BIAAC, increased gender diversity in senior management is associated with improvements in sales revenue, customers, market share, return on equity, operating profits, and share price, particularly in developed countries.¹¹ A McKinsey study of 101 companies around the world demonstrated that companies with three or more women in senior management ranked more highly on a range of organizational

⁷ Center for Women in Politics and Public Leadership, “The Pathway Forward: Creating Gender Inclusive Leadership in Mining and Resources,” Ottawa: Carlton University, 2012, 30.

⁸ AmCham France and BIAAC, “Putting all our Minds to Work: Harnessing the Gender Dividend,” 15.

⁹ Willem Adema et al., “Enhancing Women’s Economic Empowerment through Entrepreneurship and Business Leadership in OECD Countries,” Paris: OECD, 2014, 26.

¹⁰ Deloitte, “Women in the Boardroom: A Global Perspective,” Deloitte: 2015, 8.

¹¹ Harry Sanderson, “Rio Tinto Faces Pressure Over Lack of Female Directors,” *The Financial Times*, April 11, 2017.

BOX 1-A Shareholder Pressure Grows to Diversify Boards in the Mining Industry

Increased investor interest and pressure in gender-diverse boards is starting to have concrete ramifications for companies that are lagging behind.

For instance, in 2017, the \$330.4 billion investment fund Hermes EOS instituted a policy to vote against any FTSE 100 boards with less than 25 percent women and that lack a “credible plan for increasing the number of women.” On April 11, 2017, it was reported that the Hermes EOS pension advisory group was urging shareholders to hold current Rio Tinto Chairman Jan du Plessis accountable not only for the lack of gender diversity currently (currently 3 out of 14 board members, or 21 percent), but also for the lack of a credible plan to address the diversity issue.

However, the boards of FTSE 100 companies average approximately 26.7 percent female directors—in response to the UK government’s 2015 target of 25 percent female representation on boards of FTSE 100 companies. Recently, the government raised the target to 33 percent female representation by 2020. Rio Tinto has not yet publicly responded to the challenge.¹²

metrics including “capability, leadership, external orientation, accountability, motivation, coordination and control, innovation, direction, and work environment and values that are positively associated with higher operating margins.”¹³ And the AmCham France study reveals that companies with more gender-diverse senior management teams outperformed those with less, as measured by 41 percent higher returns on equity and 56 percent better operating results.¹⁴ The bottom line, according to Dow Jones: “A company’s odds for success increase with more female executives at the vice president and director levels.”¹⁵

- **Improved team function and innovation:** When managed well, broadly diverse teams (and not only in terms of gender) have been shown to perform better than homogenous teams, including on metrics such as fostering greater innovation.¹⁶ A study published in the Harvard Business Review found that managers who listen to and act on women’s ideas enable a “speak-up culture” that capitalizes on women’s creativity. “Leaders who are willing to change direction based on women’s input are more than twice as likely to tap into winning ideas. And leaders who make sure each female member on the team gets constructive and supportive feedback are 128 percent more likely to elicit breakthrough ideas,” the study notes.¹⁷

¹² Deloitte and BIAC, “Putting All our Minds to Work: An Assessment: Business Survey Results,” Paris: Deloitte, 2014, 8.

¹³ Georges Desvaux, Sandrine Devillard-Hoellinger, and Mary C. Meane, “A Business Case for Women,” *McKinsey Quarterly*, September 2008, 2.

¹⁴ The study looked at data from 2007-2009, and found a 41 percent better return on equity (22 percent compared to 15 percent), and 56 percent higher operating results (17 percent compared to 11 percent). AmCham France and BIAC, “Putting all our Minds to Work: Harnessing the Gender Dividend,” 8.

¹⁵ Workplace Gender Equality Agency, “The Business Case for Gender Equality,” 4.

¹⁶ Deloitte and BIAC, Putting All our Minds to Work: An Assessment: Business Survey Results, 4.

¹⁷ Sylvia Ann Hewlett, Melinda Marshall, and Laura Sherbin, “Women Drive Innovation and Growth,” *Harvard Business Review*, August 2013.

- **Improved management throughout the organization:** A study that examined 15 years of results from S&P1500 firms found a range of benefits associated with women in senior management, including a positive effect on managers of both sexes throughout the firm as well as a motivating impact for female middle managers.¹⁸
- **Diversity of leadership styles:** A McKinsey study that observed differences in male and female leadership styles noted the positive impact of women’s leadership on company performance.¹⁹ Women in leadership positions may be more “forward-looking” than men, which can manifest in less volatile or risky behavior, and increased attention to sustainability, “consensus-building, and compassion” in companies.²⁰ Studies show that while men tend to prefer working with other men, women are more likely to use teamwork and cooperative approaches that draw on the skills and resources of a broader network.²¹ A 2013 Canadian study of more than 600 company boards noted that female directors outscored male directors on key decision-making metrics, such as “complex moral reasoning,” which can indicate better decision-making skills in complex situations with multiple competing interests.²²
- **Better outcomes for sustainability and compliance:** Companies with more gender-inclusive senior leadership—particularly women-owned businesses—often rank higher on key environmental, social, and governance risk management indicators.²³ In addition, companies with more gender diverse senior management tend to have greater “public accountability, social justice, full participation and compliance with international conventions or national legislation.”²⁴
- **Increased shareholder interest:** As with gender diversity at the board level, private and institutional investors increasingly are looking at gender balance in senior management as part of their investment criteria. Evidence also suggests that announcements of women being promoted into senior management can correspond to a rise in stock prices, especially in female-led industries in developed countries.²⁵

The Value of a More Gender-Diverse OGM Workforce

OGM companies benefit not just from gender diversity and inclusion on boards and in senior management. In fact, there is a strong business case for increased gender diversity at all levels of the workforce.

¹⁸ IFC, *SheWorks: Putting Gender Smart Commitments into Practice*, 15, citing C. Deszo and D. Ross, “Does Female Representation in Top Management Improve Firm Performance? A Panel Data Investigation.” RHS Research Paper, 06-104, https://www0.gsb.columbia.edu/mygsb/faculty/research/pubfiles/3063/female_representation.pdf.

¹⁹ McKinsey & Company, “Women Matter 2010: Women at the Top of Corporations: Making it Happen,” Paris: McKinsey & Co., 2011, 7.

²⁰ McKinsey & Company, “Women Matter 2: Female Leadership: A Competitive Edge for the Future,” Paris: McKinsey & Co., 2008, 1.

²¹ OECD, “Background Report: Conference on Improving Women’s Access to Leadership,” Paris: OECD, 2016, 28.

²² International Corporate Governance Network, “ICGN Guidance on Gender Diversity on Boards,” London: ICGN, 2013, 9.

²³ OECD, “Background Report: Conference on Improving Women’s Access to Leadership,” 26.

²⁴ GRI and IFC, *Embedding Gender in Sustainability Reporting – A Practitioner’s Guide*, 5.

²⁵ OECD, “Background Report: Conference on Improving Women’s Access to Leadership,” 28.

- **Deeper and wider talent pool:** In many countries, the change in mineral prices means that the mining sector is facing a shortage of skilled workers. Women represent an untapped resource. Hiring more women can help ease labor shortages, expand the talent pool, and enable companies to recruit more locally.
- **Improved innovation, performance and organizational culture:** As at the board and senior management level, gender-diverse work teams promote innovation, communication, and improved team dynamics more strongly than more homogenous workforces.²⁶ It is important to note here that these improvements result from an equitable gender mix, rather than from simply hiring more women.
- **Safer operating environment:** Numerous studies have demonstrated that female employees often are more likely to follow safety protocols, treat equipment responsibly, and operate safely.²⁷ In part, this may be due to socialized differences between men and women: men may have a greater tendency towards bravado and the desire to seem infallible, which can make them operate less safely; women, on the other hand, are more likely receptive to coaching or instruction and more likely to react cautiously or deliberately to dangerous or potentially hazardous situations. As a result, women operators are increasingly in demand, because their behavior yields better safety outcomes, reduced equipment maintenance and repair, and a more safety-conscious operating environment.²⁸ If this creates pushback from male staff, it is even more important to build an understanding that gender diversity and inclusion—and the related benefits—are good for the whole company.
- **Improved community relations:** Gender diversity in the workforce is also correlated with improved community relations. A gender-diverse community engagement staff gives companies a greater ability to internalize and respond to community concerns. This can lead to more gender-sensitive community engagement programs. Such a staff can help expand local employment, build wealth within the community, and serve as a conduit to enable better community understanding of the project. Greater gender diversity and awareness on the part of community engagement staff can bring about the hiring of more local women, rather than a hiring approach that draws mainly male workers from outside communities. In some contexts, hiring local women instead of men from other communities can help mitigate some of the social and economic stresses often associated with OGM projects. It also can contribute to building stronger relationships between the company and community.
- **Improving local and national economic conditions:** For OGM companies that are committed to the economic development of their host countries and host communities, increasing the

²⁶ AmCham and BIAC, “Putting all our Minds to Work: Harnessing the Gender Dividend,” 8.

²⁷ IFC, *Investing in Women’s Employment: Good for Business, Good for Development*, Washington, DC: IFC, 2013, 20.

²⁸ Women in Mining Canada, *Welcoming Women: An Action Plan for Canada’s Mining Employers*, Toronto: WIM Canada, 2016, 7.

BOX 1-B BHP Billiton Leads the Way in Balancing its Workforce Gender Scales

In October 2016, BHP Billiton announced that it would aim for a 50 percent female workforce by 2025, up from the current 17 percent.

In a 2016 interview with the *Financial Times*, BHP CEO Andrew Mackenzie said that the business case for greater gender inclusiveness was “undeniable.” As of the date of the interview, the company had experienced a 15 percent improvement in performance in its 10 most gender-inclusive operations. To achieve the goal of gender parity in the workforce, BHP has developed interim targets, including holding senior managers accountable for improving women’s representation, he said.

Senior managers will need to be able to demonstrate how they have contributed to the goal of a 3 percent yearly increase in female representation throughout the company. The company has made strides towards hiring more women for junior positions; however, Mackenzie said that there will be greater emphasis on increasing gender parity in senior management and the board, where progress has not been quite as strong.²⁹

numbers of working women can raise GDP, increase national competitiveness, and reduce household poverty rates significantly. PwC estimates that increasing the number of women in the workforce to the point of parity with men would raise GDPs in countries around the world—5 percent improvement in the U.S., 12 percent improvement in the United Arab Emirates, and 34 percent improvement in Egypt, for example.³⁰

Reasons for Lack of Female Representation in the OGM Workforce

Despite the strong business case for gender diversity, women are still underrepresented in the oil, gas, and mining industries. In 2016, women made up only 7.9 percent of board seats in the top 500 global mining companies; of those, among the top 100 companies, 94 percent of women represented were in non-executive positions. In Australia, women made up only 11.3 percent of the OGM workforce in 2009, although by 2015, this number had increased slightly—to 14.3 percent. In 2015, Canada, women comprised 19.4 percent of Canada’s mining, quarrying, and oil and gas extraction labor force.³¹

Meanwhile, in many countries, more women are graduating with engineering and other technical degrees. For instance, in the U.S., women earned only 2 percent of undergraduate engineering degrees conferred in 1975. Today, 18 percent of these degrees are held by women.³² As the sector

²⁹ PwC, “Empowering the Third Billion: Women and the World of Work,” San Francisco: PwC, 2012, 3.

³⁰ James Wilson, “BHP Billiton aims for 50% of workforce to be women by 2025,” *Financial Times*, October 19, 2016.

³¹ Catalyst, “Women in Energy: Quick Take,” 2016, <http://www.catalyst.org/knowledge/women-energy>.

³² According to the American Physical Society, engineering includes aerospace, chemical, civil, electrical, industrial, materials, mechanical, and other engineering fields. For more see: American Physical Society, “Fraction of Bachelor’s Degrees Earned by Women, by Major,” August 16, 2017, <https://www.aps.org/programs/education/statistics/womenmajors.cfm>.

becomes increasingly mechanized and less reliant on heavy manual labor, the traditional arguments for a male-dominated sector—such as that women are not strong enough to handle heavy manual labor and that women do not apply for these jobs— are becoming less valid.³³

What are some of the external and internal factors that continue to keep women out of the OGM workforce?

External Factors

External factors include bias, both inside and outside of the industry. Oil, gas, and mining jobs have traditionally been seen as “men’s work.” This can lead to unconscious bias in:

- **Recruitment materials:** Such as job descriptions that use the term “men” and advertisements that only feature male images and male voices.
- **Recruitment proceedings:** Such as over-reliance on sectoral networks, which may include primarily men, leading to low numbers of women applying for OGM jobs or pursuing degrees in fields that would lead to OGM work.

Among host communities, bias can make the sector unattractive to women. In an interview, Wilhemina Manaso, a mine manager for BHP Billiton in South Africa, observed, “As a woman, if you’re doing well in a male-dominated industry they think you’re having an affair with one of the senior managers. Every time I was promoted, they would say, ‘How come you promoted her? Is she having a relationship with you?’”³⁴

Internal Factors

An unsupportive corporate culture is among the internal factors that contribute to women’s underrepresentation in the OGM workforce. A long history of male-dominated workplaces can shape this corporate culture, making it less supportive of women employees. Other key culprits include:

- **Sexism:** Predominantly single-sex work environments can breed a culture of unconscious or overt sexism that makes it difficult, intimidating, or discouraging for employees or potential employees of the opposite sex.
- **Lower wages, fewer promotions:** Globally, across industries, women earn less than men for the same jobs and typically earn fewer promotions during their careers than their male counterparts. This can make male-dominated sectors even less attractive.³⁵ The disparities can be caused by a number of factors, including differences in negotiation tactics and the fact that

³³ Mechanization can also mean a contraction in some traditional jobs, leading to decreased or changed labor force requirements.

³⁴ Worldwide Recruitment Solutions, “Let’s Talk About: Women in the Mining Industry,” 2014, <http://www.mining.com/lets-talk-about-women-in-the-mining-industry-31775/>.

³⁵ McKinsey and Lean In, “Women in the Workplace 2016,” 2016, 3.

women are more likely to work part-time or to have taken time off for family commitments, which may result in their being viewed as less committed to careers or discriminated against as part-time workers.³⁶

- **Lack of mentors, female role models, and customized training:** Even as the number of women at various levels of OGM companies increases, there may not be enough mentors, female role models, or women-specific training to guide women's OGM career trajectories and navigate the specific challenges women encounter in OGM companies.
- **Lack of professional development opportunities for women:** With male-dominated workplaces and a lack of female senior managers, women may feel excluded from informal networking activities and from professional development opportunities. In addition, individual career counselling and career workshops may be or appear less available to women, especially when women lack the same social networks that men have and in situations where women in the workplace are few in number.³⁷
- **Lack of support for flexible work arrangements and parental leave policies:** In communities where cultural expectations and/or legal or corporate regulations around parental leave assume that women are primary care-takers, leave policies in traditionally male-dominated industries may not provide the flexibility that parents need. When most employees are male, policies may not be designed to support re-entry and career progression for women who return after parental leave. Similarly, such environments may discourage men from taking advantage of flexible work arrangements.³⁸ If men chose to take time off as caretakers, they may not have sufficient leave available. They too may struggle to access professional development and opportunities upon their return. The nature of OGM work, which often requires fly-in, fly-out schedules or shift work, can make it particularly difficult for employees with child- or elder-care responsibilities, further discouraging women from applying or staying in the industry.
- **Infrastructural and technical challenges:** Lack of consideration for women as employees can dissuade women from considering the OGM industries as viable and welcoming job opportunities. This lack of consideration can be manifest by ill-fitting, inappropriate or unsafe uniforms, personal protective equipment, and other gear, such as overalls that do not accommodate pregnancy or equipment that is ergonomically challenging for women.

³⁶ Australian Institute of Company Directors, "Gender Diversity Quarterly Report," September–November, 2015, 9, https://aicd.companydirectors.com.au/~media/cd2/resources/advocacy/board-diversity/pdf/05180-4-coms-gender-diversity-quarterly-report-deb15-a4_v6.ashx.

³⁷ Jonathan Dunlea et al, "Developing Female Leaders: Addressing Gender Bias in Global Mobility," Melbourne: PwC, 2015, 5.

³⁸ Melanie Sanders et al, "The Power of Flexibility: A Key Enabler to Boost Gender Parity and Employee Engagement," Bain and Company, 2016. <http://www.bain.com/publications/articles/the-power-of-flexibility.aspx>.

Strategies to Address the Gender Gaps

OGM companies that want to narrow their gender gaps will need to take a multi-pronged approach to accomplish the goal. Presented here are several key strategies to keep in mind, along with the applicable tool that can help guide your company's approach.

- **Create an inclusive physical work environment:** Consider the physical infrastructure and workplace: What accommodations are made to ensure that both men and women can work safely and effectively on the job site? For instance, are there gender-neutral bathrooms and change houses? Are uniforms designed and fitted for men and women? Tool 1.1 includes questions for determining the safety and feasibility of the physical work environment and equipment.
- **Develop an organized gender equity strategy, including targets, monitoring, and accountability:** Companies looking for progress on gender diversity need to identify strategies for increasing levels of gender diversity, and implement accountability mechanisms. Are efforts at gender mainstreaming ad hoc by certain staff or have senior staff publicly declared to employees and stakeholders that gender diversity is a corporate commitment? Gender diversity should be part of management training and key performance indicators (KPIs). The strategy also should be focused on creating opportunities and a more supportive environment, as well as identifying ways to reduce bottlenecks for women beyond quota systems. Tool 1.4 provides insight on developing a gender equity strategy.
- **Revise recruitment policy materials to target men and women:** In male-dominated industries like oil, gas, and mining, recruitment campaigns often feature men as employees, or male-centric descriptions of the job lifestyle on-site, which may send implicit messages that discourage women applicants. If you want to encourage diverse applicants, you will need to work harder to explicitly communicate that there are opportunities for all. Print or media advertisements should feature inclusive imagery and voices: for example, showing both men and women in leadership positions and in non-traditional roles. Recruitment literature for on-site jobs could feature images of an inclusive on-site work culture that is welcoming to both men and women. Of note, job descriptions that use inclusive language, such as “foreman/forewoman” can be more appealing than gender-neutral language such as “foreperson.”³⁹ Advertisements should specifically encourage both men and women to apply.⁴⁰ See Tool 1.11 for insight on recruitment strategies to attract female applicants.
- **Build senior leadership support for gender diversity:** In OGM, senior leadership is overwhelmingly male. As a result, men typically are the gatekeepers to the positions of power.⁴¹ This means that effective gender mainstreaming relies on leadership from the CEO

³⁹ Australian Human Rights Commission, *Women in Male-Dominated Industries: A Toolkit of Strategies*, Canberra: Australian Government, 2013, 16.

⁴⁰ Iris Bohnet, *What Works: Gender Equality by Design*, Cambridge: Harvard University Press, 2016, 148.

⁴¹ European Commission Network to Promote Women in Decision-Making in Politics and the Economy, “Working Paper: How to Engage Senior Men to Promote Women to Senior Decision-Making positions in their Organizations,” Brussels: Directorate-General for Justice and Consumers, 2012, 4.

and from the entire management cadre. Tool 1.12 provides guidance on how senior managers can support gender diversity.

- **Create a more inclusive, gender-supportive worksite culture:** To attract and retain female staff and reap the benefits of a diverse workforce, companies need to cultivate an organizational culture that is inclusive of both men and women. Creating a gender-inclusive work environment isn't just about policies to hire more women. It's also about creating an environment in which men and women alike recognize the benefits of gender diversity and enacting policies that ensure gender-equitable promotion possibilities, foster women's leadership and career development, support flexible work arrangements, address and penalize sexual harassment or discrimination, and do not penalize employees for balancing work and family commitments. Tool 1.13 helps companies identify and address barriers to an inclusive workplace culture and create a more inclusive work environment.
- **Support flexible work arrangements:** Flexible work policies should support full engagement in family life for both male and female employees. This includes creating opportunities for shorter rosters, shift-swapping, or condensed work schedules, among other tactics. It also includes establishing return policies for women who left the company to raise children. Providing or supporting childcare, laundry services, and on-site banking can help working parents better manage family and professional responsibilities. This also leads to a more efficient and effective workforce. Tool 1.13 provides strategies for developing flexible work schedules and supporting work-life balance are discussed.
- **Support career development opportunities for men and women:** Tool 1.14 provides strategies for career development activities that support more gender-equitable career development and create a more attractive workplace for potential candidates.

Realizing Gender Diversity Gains Takes Effort and Commitment

Companies that recognize the potential benefits of creating equal opportunities for men and women, and take actions to target, recruit and retain both men and women, stand to benefit from a wide range of performance, innovation, and profitability gains.

Among the factors that inhibit gender diversity in the OGM workforce, some are issues that can be addressed by changes in work schedules, equipment, and by proactively reaching out to attract more gender diverse candidates. Others are based on gender bias and stereotypes. Approaches to tackle these various challenges will require both incremental changes in schedules and equipment, as well as training and changes in organizational culture.

Realizing these gains will require companies to examine and address their policies surrounding recruitment, performance management, work schedules, and compensation, to draw women into management and the workforce and, importantly, to keep them there. Tool Suite 1 provides concrete guidance that will help you better understand your company's gender diversity challenges, ways to address the challenges, and how to monitor and sustain progress.

TOOL SUITE 1: Tools to Increase Gender Diversity and Inclusion in OGM Companies

What steps can your company take to recruit, attract, and retain women so that you can achieve better gender balance at all levels of your workforce, from the mineshaft up through and including senior-level management and the board?

Tool Suite 1 features 16 tools aimed at reducing gender gaps on boards, in senior management, and in the workforce. Because of the complexity of the effort, the tool suite is organized by theme. First, tools are provided to help you establish a baseline on company-wide gender diversity and create a gender diversity strategy. The next section focuses on increasing women’s participation on boards. Finally, focus is on building a more gender-balanced senior management team and staff.

The tools will help you to:

- **Assess and prepare:** Assess your company’s ability to understand and take action on gender gaps in your workforce, and put in place staff, structures, and plans to address these issues.
- **Address:** Take specific practical actions to increase gender diversity, inclusion, and gender-equitable opportunities through recruitment, retention, and promotion.
- **Monitor and sustain:** Monitor progress and institutionalize mechanisms to ensure continued improvement and sustained progress.

Table 1-A below provides a breakdown of the tool suite, based on topic area and key players within the company who will care about and be responsible for actions and interventions.

TABLE 1-A Overview of Tool Suite 1

| TOOL | TARGET UNIT | GOAL |
|---|---|---|
| Company-Wide Baseline and Strategy Development | | |
| ASSESS and PREPARE | | |
| TOOL 1.1: Gender Audit | Executive Board, Senior Management, and Human Resources | Provide a baseline on gender diversity in the workforce |
| TOOL 1.2: Terms of Reference for Gender Audit | Executive Board, Senior Management, and Human Resources | Provide a terms of reference for hiring a firm to conduct a thorough gender audit |
| TOOL 1.3: Develop a Business Case for Gender Diversity | Executive Board, and Senior Management | Build support for gender-smart solutions |

| TOOL | TARGET UNIT | GOAL |
|---|--|--|
| ADDRESS | | |
| TOOL 1.4: Establish a Gender Equity Strategy | Senior Management, Training, and Human Resources | Set corporate goals and strategy for gender diversity and prioritize tools and action on gender diversity |
| TOOL 1.5: Terms of Reference for a Gender Equity Champion | Human Resources and Senior Management | Lead and coordinate gender mainstreaming efforts |
| Gender Diversity and Inclusion on Boards | | |
| ASSESS and PREPARE | | |
| TOOL 1.6: Gender Diversity Board Assessment | Executive Board | Assess board gender diversity |
| ADDRESS | | |
| TOOL 1.7: Checklist for Building a Gender Diversity Board Assessment | Executive Board | Increase board gender diversity |
| MONITOR and SUSTAIN | | |
| TOOL 1.8: Checklist for Monitoring and Sustaining Gender-Diverse Boards | Executive Board | Maintain board gender diversity |
| Gender Diversity in Senior Management and Staff | | |
| ASSESS and PREPARE | | |
| TOOL 1.9: Terms of Reference for Pay Gap Study | Human Resources | Identify bias in compensation |
| ADDRESS | | |
| TOOL 1.10: Review Recruitment Procedures | Human Resources | Developing a gender-equitable hiring process, and increasing number of women in the workforce |
| TOOL 1.11: Set Gender Recruitment Targets | Human Resources and Senior Management | Developing a gender-equitable hiring process, and increasing gender diversity and inclusion in the workforce |
| TOOL 1.12: Checklist for Senior Leadership to Demonstrate Commitment | Senior Management, Training, and Human Resources | Demonstrate commitment to creating a gender-equitable work-environment for both men and women across the company |
| TOOL 1.13: Develop Human Resources Policies to Support Gender Diverse Workforce | Human Resources | Develop policies that promote retention of both male and female employees |
| TOOL 1.14: Developing Women's Careers and Leadership | Training | Support gender equitable career development and mobility |
| MONITOR and SUSTAIN | | |
| TOOL 1.15: Monitoring, Evaluation and Reporting | Human Resources | Track and support gender-diversity progress |
| TOOL 1.16: Monitor and Sustain Training Programs for Gender Equitable Career Development | Training | Monitor and sustain career development programs |

TOOLS 1.1–1.5: Company-Wide Baseline and Strategy Development

ASSESS, PREPARE, AND ADDRESS

This section includes several tools that will help you develop a baseline understanding of where your company stands on gender equality and equity. It also offers guidance on creating a gender strategy based on this understanding. These steps are critical to determining your overall approach to improving gender balance in your workforce.

Tools 1.1–1.5 provide guidance on these critical first steps, including defining a gender audit process, which will form the foundation of your company baseline. Once you have completed your overall baseline assessment and strategy development process, you can move into a more detailed exploration of how to identify and address specific gender gaps in your workforce. These issues are covered in more detail in subsequent sections of the tool suite.



TOOL 1.1: Gender Audit

- ▶ **GOAL:** Assess gender equity across the organization
- ▶ **TARGET UNITS:** Led by Human Resources; organization-wide

What is a Gender Audit?

A “gender audit” is a baseline assessment for companies that want to develop an understanding of where they stand on a range of gender-related issues. Depending on the company’s objectives, these metrics can include:

- Gender diversity among staff
- Potential for men and women to be promoted
- Retention of both male and female staff
- Suitability of the physical work environment for men and women
- Extent to which gender diversity is a demonstrated priority in recruitment
- Extent to which men and women are equitably consulted in community engagement

Gender audits are highly customizable, meaning that all companies can use this audit tool to establish a baseline, identify gaps, and suggest potential measures for improvement on gender diversity and inclusiveness. Gender audits can be conducted for a whole organization or for particular business units. They are essential for starting or improving on gender diversification. For companies developing an initial gender baseline, a gender audit of the whole company is recommended. It can be repeated periodically, with more frequent repetition in specific business units as necessary.

Why Conduct a Gender Audit?

To gain a thorough understanding of your gender diversity issues, develop a strategy for action, and prioritize key interventions, a gender audit is a good first step.

Baseline assessments—and follow-up monitoring (see Tool 1.16 for more on monitoring)—are important for a number of reasons:

1. An initial baseline and stock-taking will help you identify areas of focus for your gender-sensitizing efforts: where are the most noticeable gaps? Where is the most work required? Are there gender equality-related areas where you are doing well? Where is there progress to be made?
2. Baseline and follow-up assessments will help you track the impact of policies and programs. This information will help you identify areas where you should to set targets and invest

resources, such as activities to boost recruitment and retention of women employees. In addition, this data ultimately will help companies to evaluate whether activities and initiatives are bringing them closer to their goals or if modification is needed.

3. Follow-up assessments, in particular, can help determine how employees feel about programs. Such assessments offer insights on whether programs are having the desired effect of creating a more inclusive workforce. They also provide an indication of how well employees are responding to the efforts to change the corporate culture.
4. Surveys and assessments can help employees feel engaged in the corporate change process, to feel that their concerns and opinions are being heard, and to feel invested in affecting change.⁴²

Who Conducts a Gender Audit?

Gender audits should be done either by staff with experience conducting gender audits⁴³ or a firm of consultants with expertise in gender audits. When in-house staff handle the process, they should be allotted sufficient time. They should report directly to senior management on the outcomes.

When Should a Gender Audit be Conducted?

A discussion at the board and/or senior management level to identify key gender diversity objectives and desired changes is the first step in developing a gender audit. By identifying key objectives, such as “gender diversity in the workforce,” “inclusive work environment,” “safe and inclusive physical work environment,” the audit can then target assessments to identify progress, opportunities, and bottlenecks.

With these recommendations, audits can become a first step toward developing a gender diversity strategy. In addition, they can serve as a monitoring and sustainability tool by repeating them periodically and focusing on particular priority areas as identified in the gender diversity strategy.

Audits should be the first step in a larger gender diversity process, in which the corporate board and senior management commit to following through on audit recommendations. Be sure to include a budget for follow-up activities based on audit recommendations, as well as monitoring and review, to assess progress.

Audits should be well-publicized internally. They should be communicated as an opportunity to understand challenges and bottlenecks and create improvements towards business outcomes that will benefit the whole company. Results and planned follow-up activities and changes should be communicated to all staff.

⁴² IFC, *SheWorks: Putting Gender Smart Commitments into Practice*, 85.

⁴³ Staff can receive training from the ILO to become certified gender auditors. For more see: http://www.ilo.org/gender/Informationresources/WCMS_187411/lang--en/index.htm%20and%20https://

What Types of Data are Collected in a Gender Audit?

Gender audits rely on data sources, such as staff surveys, focus groups, and key informant interviews with staff; reviews of corporate policies/manuals; quantitative analysis of metrics around recruitment, retention, and promotion; stakeholder reports and other communications; performance evaluations; and available gender compliance reports (for instance, Australia's Workplace Gender Equality Agency compliance reports). Audits can and should be conducted at the corporate level as well as at the site level, although the scope can be modified depending on resources available.

Gender audits also can include a participatory design phase. This enables staff to identify issues of greatest concern to them before the survey is rolled out more widely for data gathering across the entire organization.

The gender audit tool provided here features a non-exhaustive list of questions that might be included in an oil, gas, or mining company gender audit. It includes yes/no questions, open-ended questions, and questions that can be ranked on a scale from 1–5. It can be deployed by way of interviews, surveys, or focus groups. And it can be customized depending on your company's unique circumstances.

This list is a good place to start, although, as noted above, you should consider a participatory pilot process to solicit issues of key importance to employees, which could then be included as part of your final gender audit.

Note that the tool's focus is on how the company prioritizes and implements gender-diversity. It does not measure how well gender is integrated into supply chain policies, or community engagement activities. These issues are addressed specifically in tool suites 2 and 3.

Gender-Sensitive Health and Safety Risk Assessments

Included in the gender audit are questions about physical safety and the health risks associated with certain jobs, job families, and the work environment. Questions also get at how health and safety risks are identified and addressed. Assessing and understanding the differences in male and female physical capabilities and vulnerabilities will help ensure a safe and productive work environment for all.

Such assessments also contribute to a better understanding of the ways in which men and women identify, define and perceive risks. It can improve risk reporting and help distinguish between presumed and genuine health and safety risks. Physical risk assessments can help to combat bias in hiring by ensuring that job descriptions and evaluation criteria focus on the specific physical skills required for a job rather than relying on traditional assumptions and bias.

In addition, use of health and safety risk assessments can give employees greater comfort in reporting health concerns. For instance, women of reproductive age, pregnant women, and breastfeeding

women may have certain acute health and safety risks about which they would be more forthcoming in reporting if such an assessment was part of the workplace culture. Health and safety risk assessments also serve as a tool to clarify actual risk factors, to avoid overly stigmatizing pregnant women or discouraging them from reporting pregnancies.

Men and women may have very different perceptions of risk, for instance with regards to sexual harassment or the potential for gender-based violence. Women may feel vulnerable in different situations than men (or vice versa), and in different cultural contexts men and women may feel differently able to report misconduct to managers.

In instances of sexual harassment or assault, it could be more challenging for men to report misconduct, particularly in environments that stigmatize homosexuality. At a male-dominated worksite, it might be assumed that women are more frequently the victims and there may be clearer avenues for women to report misconduct than for men. For this reason, it is important that both men and women are involved in identifying areas of concern or risk, as well as in evaluating these risks and developing recommendations for solutions that will alleviate their concerns.

In addition, it is important to note that in a male-dominated workforce, women may be under-represented in health and safety departments and therefore have fewer opportunities to identify female health and safety risks—including preventative measures to mitigate potential risks. Women also may believe that their jobs are less secure than those of male co-workers, so they may feel less empowered to report health and safety issues. In some cultural contexts, reporting issues to male colleagues could represent another problem. Finally, in some situations, reporting arrangements might not be conducive to disclosing highly sensitive information. For instance, inappropriately designed sexual harassment reporting mechanisms that require employees to report issues in person to a male manager who may or may not be trained in appropriate response mechanisms can mean that the issue goes underreported.⁴⁴

Gender-sensitive health risk and safety assessments should be participatory to allow men and women to identify health and safety risks, which can then be assessed for prevalence and degree of risk.

What follows are the steps in a gender audit, a sample gender audit terms of reference, and a guidance note to help companies consider how to translate audit findings into recommendations and action.

Gender Audit in 3 Steps⁴⁵

A Gender audit typically requires several key steps, summarized here.

⁴⁴ IFC, “Gender Smart Safety in the Workplace: Guidelines for New Product Roll-Out,” Washington, DC, (forthcoming), 8.

⁴⁵ Steps adapted from Jeannie Harvey and Patricia Morris, *The Gender Audit Handbook*, Washington, DC: InterAction, 2010.

1. Develop political will and organizational readiness.

As the first step in developing and implementing a gender strategy, gender audits require a degree of internal political will to commit resources and communicate the priority to the company. If a gender champion has already been recruited, this is the person who should spearhead efforts and develop momentum for a gender diversification initiative. If the gender champion has not yet been recruited (see Tool 1.5 for more on gender champions), committed senior staff must bring senior management on board to recognize the importance and potential value of improving gender balance, even before the initial audit has been conducted.

2. Conduct staff survey and organizational assessment.

Once a gender audit has been initiated, the gender auditors will conduct various layers of staff surveys, likely including written surveys, focus group discussions, and key informant interviews. Duration and scope will be determined by the company size, geographic scope, and the breadth of the audit agreed with the gender auditors. A phased approach is recommended, starting with a participatory process in which staff can provide input on gender equity issues and indicators of greatest importance to them, which can then be explored through broader data collection.

3. Follow-up with concrete action plan.

A key aspect of the gender audit is how it will be used: how will findings be translated into recommendations and action? How will actions be implemented? How will there be accountability for action? Guidance on how to interpret gender audit results and translate them into action are provided in the coming pages.

TABLE 1-B Sample Questions to be Included in a Gender Audit for OGM Industries⁴⁶

CORPORATE GENDER PRIORITIES

- ▶ Is there a gender equity and/or diversity policy?

- ▶ Does the gender equity policy include explicit prohibition of discrimination based on gender, in hiring, salary and benefits, promotion, discipline and termination, layoffs, or retirement benefits? (Policies should prohibit discrimination based on race, religion, sex, ancestry, age, marital status, sexual orientation, and gender identity/expression)

- ▶ Is there a clear operational plan—including budget and accountability structures—for implementing the gender policy?

- ▶ If there is such a policy, does it apply to HQ as well as to country/field offices?
 - Is implementation/enforcement of this policy monitored at the HQ level?
 - Is implementation/enforcement of this policy monitored at the country- and site-level?

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⁴⁶ Sample audit adapted from ILO, *Manual for Gender Audit Facilitators*, Geneva: 2012; and Harvey and Morris, *The Gender Audit Handbook*.

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- ▶ Is there a gender focal point, or focal point team at the corporate level?
- ▶ Are there gender focal points in country/field offices?
- ▶ Does the company mandate that gender be a consideration in policy/project/program development and monitoring, for all projects/programs? (For instance, is it mandated that gender be considered in new HR policies and in community engagement activities such as social impact assessments or consultations, supply chain development activities, and other relevant documents?)
- ▶ Is attention to gender measured in KPIs:
 - At the board level?
 - In senior management?
 - Among staff with management authority?
- ▶ Are there company-sponsored opportunities to learn about corporate gender priorities, or other gender-focused trainings?

HUMAN RESOURCES

- ▶ Have HR staff ever been given gender-awareness training? Or are there HR staff trained in gender-awareness and gender mainstreaming?
- ▶ Have HR staff taken the Harvard Women and Public Policy Program (WAPPP) Implicit Associations Test? If yes, what were their scores? If not, have staff take the test and record scores.
- ▶ Have all non-managerial or HR staff received gender bias training?
- ▶ Is there an ombudsperson or other conflict resolution service for women?
- ▶ Have targets been set and communicated for gender diversity in recruitment and staffing at all levels?
- ▶ Is there an organization-wide monitoring and evaluation system for measuring progress against gender targets?
- ▶ Does the company require gender-disaggregation of all company-wide hiring, promotion, and retention data?
- ▶ Has a pay gap assessment been conducted, including at HQ, country, and field offices?
 - If yes, what actions have been taken to address any identified gaps?

RECRUITMENT PRACTICES

- ▶ In job advertisements, how often are female images and/or voices used, compared to male images?
- ▶ How often do job advertisements use language that specifically encourages female applicants?
- ▶ Do job descriptions describe required skills, rather than a type of person to fill vacancies?
- ▶ Do you ask interview questions related to marriage or family status of applicants?
- ▶ Have you briefed recruitment partners on the need to provide gender balanced long-lists?
- ▶ Do you advertise roles as open to flexible work patterns?
- ▶ Do you have diverse interview panels/interviewers?
- ▶ Do you include unconscious bias in your interview training?
- ▶ Are you open to candidates from non-traditional industries/sectors?

TIPS:

- For any given position, monitor progress of female candidate at each stage of selection process.
- Conduct focus group with women on the recruitment process: What made them apply to the company? Did they perceive gender bias in the recruitment process? What would have made the process more attractive for female candidates?

GENDER-SENSITIVE HR POLICIES AND UPTAKE

- ▶ Is maternal health coverage available so female employees do not sacrifice maternity care if they cannot work throughout the duration of a pregnancy?
- ▶ Is there a parental leave policy?
- ▶ What percentage of male and female employees return from parental leave?
- ▶ What support is available to assist men and women who are re-integrating into the workplace after parental leave?
- ▶ What percentage of male employees and female employees receive promotions after parental leave?
- ▶ Are there flexwork options and are they equally available to men and to women?
- ▶ Have flexwork options been communicated to all staff?
- ▶ What percentage of male employees make use of flexwork compared to female employees?
- ▶ Does health insurance include coverage for pre- and perinatal care, fertility treatment, and contraception (including emergency contraception)?
- ▶ Is there a gender-based violence policy, including a clear set of steps for employers to take when notified of gender-based violence issues?
- ▶ Are policies in place to ensure the safety of pregnant employees?
- ▶ Do these policies consider how to ensure appropriate work (i.e. of an equivalent grade, with equivalent career prospects) for pregnant employees during pregnancy?

SEXUAL HARASSMENT AND GENDER-BASED VIOLENCE POLICIES

- ▶ Is there a written corporate policy on sexual harassment and gender-based violence?
 - ▶ Is there a complaints mechanism for sexual harassment and gender-based violence?
- TIP: Conduct focus group discussions to determine employees' level of comfort with using sexual harassment/gender-based violence complaints mechanisms and their degree of satisfaction with how these issues are resolved.*
- ▶ What are the most common sanctions for employees who have committed sexual harassment or gender-based violence?
 - ▶ Are staff given training on sexual harassment and gender-based violence?
 - ▶ What support is offered for survivors of intimate partner violence?

BOARD COMPOSITION

- ▶ What is the ratio of women to men on the board?
- ▶ What is the ratio of women to men in executive positions on the board?
- ▶ How long have current board members been in their positions?

TIP: Map this with relation to gender.

- ▶ Is there a policy for gender diversity on the board?

SENIOR MANAGEMENT

- ▶ Has senior management publicly expressed support for a gender diverse workforce?

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-
- ▶ How are managers held accountable for attention to gender diversity in:
 - recruitment?
 - promotions?
-

- ▶ Is gender diversity included in management KPIs?
-

- ▶ Do incentives exist for managers to support gender diversity?
 - What type of incentives?
-

- ▶ Have senior staff received gender diversity training?
-

STAFFING

- ▶ For each job family, what is the ratio between male and female employees?

TIP: Disaggregate between HQ, country, field offices

- ▶ For each job family, what is the ratio of pay between men and women in equivalent positions?

TIP: Disaggregate between HQ, country, field offices

- ▶ What is the percentage of male senior managers compared to female senior managers?

TIP: Disaggregate between HQ, country, field offices

- ▶ What is the percentage of female managers compared to male managers?

TIP: Disaggregate between HQ, country, field offices

- ▶ What is the percentage of profit and loss-related positions held by women compared to men?

TIP: Disaggregate between HQ, country, field offices

- ▶ Have promotions been analyzed for gender trends, compared to candidates potentially up for promotion?
-

- ▶ How do you use succession planning to improve gender diversity in more senior roles, for example, ensuring a gender-diverse talent pipeline is being developed?
-

- ▶ Within the company, is the ratio of women to men in job families above or below industry averages?
-

- ▶ What is the number and rate of turnover of employees by gender and age, per year?

TIP: Disaggregate this by HQ, country, and field offices

WORKPLACE/ORGANIZATIONAL CULTURE

- ▶ Have surveys on male and female employee perceptions of organizational culture ever been conducted?
-

- ▶ Do men and women feel that they have equal opportunities for advancement?
-

- ▶ Do men and women feel that they are equally supported in taking/returning from parental leave?
-

- ▶ Do men and women feel that they are supported in utilizing flexwork?
-

- ▶ Is there an employee voice/grievance mechanism? If so, are both men and women involved?
-

- ▶ Do men and women feel that they have equal voice in employee voice/grievance mechanisms and that men's and women's concerns are given equal weight?
-

LEADERSHIP DEVELOPMENT

- ▶ Where there are mentorship programs, are there programs specifically targeting women to connect junior women with more senior staff?
-

- ▶ Are there leadership development programs that specifically target both men and women?
-

- ▶ Is there a women's network within the company?
-

- ▶ Does the company participate in any industry mentorship or networking programs to promote women's professional development in the OGM sector?
-

HEALTH AND SAFETY

-
- ▶ Has a gender-sensitive health risk assessment been conducted for all positions?

 - ▶ Have results of health assessments been analyzed and used to modify facilities?

 - ▶ Are there on-site health facilities and if so is there at least one female staff member?

 - ▶ Have staff of on-site health facilities been trained on handling of sexual harassment/gender-based violence/intimate partner violence issues?

 - ▶ For any safety audits regularly conducted, are men and women given equal opportunity to define and identify health and safety concerns?

 - ▶ Does the department responsible for health and safety employ both men and women?

 - ▶ If there are committees that deal with health and safety, are men and women represented on all of them?

 - ▶ When women's health or safety issues are raised at the safety committee, are they heard respectfully and taken seriously?

 - ▶ Do you feel that senior management understands men's and women's different health and safety concerns?

 - ▶ If you have received health and safety training, did it include a discussion of the different issues facing men and women?

 - ▶ Do the following policies/assessments include recognition of gender differences:
 - Health and safety assessment?
 - Health and safety policy?
 - Health and safety implementation plan?
 - Health and safety training plan?
 - Sexual harassment policy?
 - Bullying policy?
 - Diversity policy?
 - Equal opportunity policy?

Physical Gender Audit

Companies can conduct an additional physical inspection to complement their gender audit. This inspection assesses the extent to which infrastructure is appropriate, safe, and adapted for both male and female employees. Such considerations are important for the comfort of both men and women on staff. In addition, they are part of addressing operational health and safety for a changing workforce. Safety is a key consideration on all OGM work sites. So, ensuring that safety applies equally for all staff is critical. These audits should be conducted across all operational sites, as well as headquarters.

As with the rest of the gender audit, companies are advised to include a participatory design phase before the audit, to allow employees to raise their own concerns and metrics for a gender inclusive workplace. With physical risks, this is equally important—employees may raise aspects of risk that auditors or employers might not have identified previously. They also might have innovative ideas on ways to mitigate these risks.

TABLE 1-C Sample Questions to be Included in a Physical Gender Audit for OGM Industries

OPERATIONAL FACILITIES⁴⁷

- ▶ In locations where uniforms are required, such as on site, are there options for two-piece uniforms with reflectors, of the same color for men and women?
- ▶ Are maternity uniforms available?
- ▶ Are single-sex changing and shower facilities available?
 - If gender-segregated facilities are available, do they comply with international standards (for instance, one shower per six women)?
 - Do facilities include shower barricades?
 - Do they include sanitary bins for women?⁴⁸
- ▶ Are there separate toilets for men and women underground? Or, if there are gender-neutral restrooms, do they provide sufficient privacy for the comfort of all users?
 - Do women's toilets or gender-neutral restrooms have facilities for the disposal of sanitary waste?

Are there lactation rooms and refrigerators?

TIP: Disaggregate for HQ, country, and field offices

- ▶ Has an ergonomic assessment been conducted to ensure that equipment is appropriate and safe for female staff?
- ▶ Are policies in place for cage etiquette?

TIP: If no surveys have been done, conduct a survey and focus groups with female staff by job family, to identify safety issues with equipment or facilities and adjustment to ensure a safe and efficient worksite.

OPERATIONAL RISKS

- ▶ Do health and safety risk assessments include the following considerations?
 - Exposure to radiation, certain chemicals, and hazardous gases can impact health outcomes for women and cause miscarriage or severe developmental conditions in fetuses.
 - Exposure to high noise levels has been associated with pre-term labor, low birth weight, and some congenital anomalies, in some studies.⁴⁹
 - Prolonged exposure to high temperatures can be associated with developmental abnormalities in babies, miscarriage, or fetal distress.
 - Exposure to heavy equipment vibrations can damage a women's ability to conceive and may be associated with miscarriage and preterm delivery.⁵⁰
 - Work environments that are designed for the male body may be ergonomically unfit for many women. Ill-fitting uniforms can create an unsafe work environment for women, leading to health and safety risks.
 - Unsafe travel to and from the worksite might be an even greater concern for women. Of particular concern is the potential for sexual harassment and gender-based violence.
- ▶ Are there programs to enable transition to equivalent-grade positions for pregnant and breastfeeding mothers so they can avoid hazards such as those listed above?

⁴⁷ IFC and Lonmin, *Women in Mining: A Guide to Integrating Women into the Workforce*, Washington, DC: IFC, 2009, 21.

⁴⁸ IFC and Lonmin, *Women in Mining: A Guide to Integrating Women into the Workforce*, 21.

⁴⁹ Committee on Environmental Health, "Noise: A Hazard for the Fetus and Newborn," *Pediatrics*, Volume 100/Issue 4, October, 1997.

⁵⁰ Sandra C. Dorman and Céline Boudreau-Larivière, *Guide to Health Pregnancies in the Mining Workplace*, Sudbury: Laurentian University, 2012, 6.

DORMS

- ▶ Are men’s and women’s dorms co-located?
- ▶ Is there sufficient lighting to ensure staff feel safe going to and from dorms?
- ▶ Are there locks on all dorm rooms?

FEMALE PERSONNEL

- ▶ Are there on-site women searchers?
- ▶ Are there women security personnel?

TRANSPORTATION

- ▶ Does the company sponsor secure transport for community-based employees?

How to Use the Results of a Gender Audit

The gender audit should return a wealth of information that can be used to identify potential areas for strengthening and improvement, in turn enhancing performance and profit. Table 1-D outlines some of the ways to use the results of the gender audit in designing potential interventions.

TABLE 1-D Turning Gender Audit Results into Action

| AUDIT AREA | POTENTIAL FINDING | POTENTIAL INTERVENTION |
|-----------------------------|---|--|
| Corporate gender priorities | <ul style="list-style-type: none"> ▶ Lack of uniform action/understanding on gender across the organization, which may lead to ad hoc gender mainstreaming, inability to maximize benefits of gender mainstreaming and diversity ▶ Lack of uniformity in action/understanding on gender between HQ and field offices, which may create unequal treatment of men and women across the organization, resulting in lack of benefits from gender diversity and creation of different employment classes | <ul style="list-style-type: none"> ▶ Develop business case for gender equity and diversity to highlight importance of comprehensive, cohesive strategy and target interventions accordingly (Tool 1.3) ▶ Develop corporate gender strategy (Tool 1.4) ▶ Appoint Gender Equity Champion (Tool 1.5) |
| Human resources | <ul style="list-style-type: none"> ▶ Lack of gender training, meaning an inability to identify implicit gender bias in HR policies, recruitment, and other areas. This may be leading to biased working conditions and failure to maximize benefits of gender diversity and equity in the workforce ▶ Lack of gender-trained ombudsperson, meaning that the company could be unaware of gender-related issues in the workplace ▶ Lack of gender-disaggregated data or pay gap analysis, making it more difficult to address and improve retention, promotion, productivity, and job satisfaction | <ul style="list-style-type: none"> ▶ Provide gender training for HR (Tool 1. 13) ▶ Conduct a pay gap analysis (Tool 1.9) ▶ Break down workforce data by gender |
| Recruitment practices | <ul style="list-style-type: none"> ▶ Lack of awareness that gender bias may be woven into recruitment materials ▶ Gender bias in recruitment materials, which could deter female candidates from applying | <ul style="list-style-type: none"> ▶ Review and revise recruitment materials and procedures to attract a more gender-diverse candidate pool (Tools 1.10 and 1.11) |

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| | | |
|--|--|--|
| <p>Gender-sensitive HR policies and practices</p> | <ul style="list-style-type: none"> ▶ Lack of family-friendly policies such as maternal health coverage, parental leave, and on-site childcare or a perception that taking advantage of such policies is discouraged, leading some employees to conclude that the workplace might not be conducive to parental leave. In turn this could increase turnover, reduce retention, or put parents at a disadvantage in professional development. | <ul style="list-style-type: none"> ▶ Review and revise HR policies (Tools 1.10, 1.11 and 1.13) ▶ Conduct cost/benefit analysis for family-friendly workplace policies (Tool 1.3) ▶ Conduct training with managers on flex-work and benefits of family-friendly workplace policies |
| <p>Sexual harassment and gender-based violence</p> | <ul style="list-style-type: none"> ▶ Lack of written policy on sexual harassment and gender-based violence, meaning a lack of established expectations, consequences, and accountability for upholding behavioral standards ▶ Non-existent or unviable processes and/or lack of ombudsperson for reporting on sexual harassment and gender-based violence, meaning lack of information on incidence and costs of gender-based violence and sexual harassment | <ul style="list-style-type: none"> ▶ Develop written gender-based violence and sexual harassment policy (Tools 4.3 and 4.4) ▶ Conduct cost/benefit analysis to demonstrate costs of sexual harassment and gender-based violence (Tool 4.1) |
| <p>Board composition</p> | <ul style="list-style-type: none"> ▶ Lack of awareness about the dimensions of board composition; inability to maximize benefits of gender diversity and equity | <ul style="list-style-type: none"> ▶ Conduct a gender assessment of board composition and how board members are selected/appointed, and update operating procedures (Tool 1.6) |
| <p>Senior management</p> | <ul style="list-style-type: none"> ▶ Lack of accountability for gender diversity in the workforce ▶ Perceived/real barriers for women to enter senior management | <ul style="list-style-type: none"> ▶ Provide gender diversity and equity training for senior management |
| <p>Staffing</p> | <ul style="list-style-type: none"> ▶ Lack of information on gender diversity in various job families, levels | <ul style="list-style-type: none"> ▶ Institute gender disaggregation of workforce data, including recruitment, retention, and promotion, further divided by HQ, country, and site offices |
| <p>Workplace/organizational culture</p> | <ul style="list-style-type: none"> ▶ Perception that men and women have unequal access to opportunities, and less support (including lack of support for flex-work, parental leave, return from parental leave) ▶ Perception that men's and women's voices are not heard equally in corporate decision-making processes | <ul style="list-style-type: none"> ▶ Conduct cost-benefit analysis on specific aspects of non-supportive corporate culture; enable men's and women's voices to be heard in decision making and accountability mechanisms |
| <p>Leadership development</p> | <ul style="list-style-type: none"> ▶ Inequitable mentorship, leadership development opportunities for men and women or a perception of inequality, negatively impacting career development | <ul style="list-style-type: none"> ▶ Cost-benefit analysis on benefits of gender-inclusive leadership development programs ▶ Improve/develop leadership development programs for men and women (Tool 1.14) |
| <p>Health and physical safety</p> | <ul style="list-style-type: none"> ▶ Inadequate attention to gender-specific employee health and safety needs, creating hazards and increasing potential liability, while reducing employee effectiveness, and negatively impacting safety and job desirability | <ul style="list-style-type: none"> ▶ Work with male and female employees to better identify perceived health and safety risks. A new IFC tool, in development now, will offer detailed guidance on conducting gender-smart safety assessments. |

TOOL 1.2: Terms of Reference for Gender Audit

- ▶ **GOAL:** Assess gender equity and environment across company
- ▶ **TARGET UNITS:** Human Resources, Senior Management

This tool is designed as a model terms of reference for an independent consultant who can conduct a gender audit. The ToR is highly customizable to your company's needs, as is the audit itself, which can be modified to include other types of potential bias or discrimination, such as against employees with disabilities.

MODEL TERMS OF REFERENCE FOR A GENDER AUDIT

Introduction

[Outline reasons for [Company] to conduct a gender audit. Introduce what has occurred thus far, the business case for gender diversity, the key objectives for a strengthened gender diversity strategy and approach, policies and initiatives are already in place. Detail the internal support for gender audit and gender diversity program.]

Objective

The objective of the gender audit is to provide a baseline for gender equity and gender diversity in the workforce for [Company]. This includes a thorough assessment of:

- a. All workforce policies, such as recruitment, leave, flexible work, and workplace safety, including policies on gender-based violence.
- b. Recruitment, wages, promotions, career development support, and benefits to identify gender-related trends and identify any potential areas of bias or discrimination.
- c. Assessment of the physical work environment, including transportation to and from the worksite, equipment, uniforms, work sites and offices.
- d. Assessment of the organizational culture: Do men and women perceive themselves to be equally included in the workplace? Are there instances of bias, discrimination or ways in which men or women may feel unsafe or discriminated against based on their gender? This assessment also includes the extent to which men and women feel that gender diversity and gender equity are prioritized, and the extent to which this is a corporate priority.

Scope of Work

The gender auditors will be responsible for:

- a. Developing a detailed gender audit methodology, which includes detailed sets of questions and intended approaches, such as key informant interviews, focus groups, surveys, and policy and analysis review.
- b. Physical audit: Review physical facilities, services, and equipment, including uniforms, to determine safety and appropriateness of use by female staff, including pregnant staff. Review personal protective equipment, job testing facilities, and medical facilities.
- c. Recruitment procedure review: Are there explicit or implicit indicators of bias or discrimination? Are recruitment efforts inclusive, or do they send signals discouraging female applicants? Are selection panels gender-balanced? Have they received gender bias training? Are interview procedures standardized and transparent? Are candidate assessments conducted impartially and transparently? Are managers accountable for increased gender diversity in teams? Evaluate gender bias in corporate recruitment and opportunities for improvement.
- d. Policy review: Does the company have a gender diversity and/or equity strategy? Does it have non-discrimination policies covering wages, promotion, flexible work, and benefits? Does the company have flexible work policies? Are staff encouraged to utilize flexible work? Does the company have a gender-based violence policy? Identify what policies exist, how they are communicated, and how staff are supported in applying policies—for instance, ways in which staff are encouraged/discouraged from taking parental leave.
- e. Governance and corporate culture: Is corporate culture inclusive? Do male and female staff feel equally valued, able to advance, and protected by policies? Do male and female staff feel equally comfortable holding colleagues and managers accountable for any perceived gender bias or discrimination? What services exist for holding staff accountable?
- f. Performance management: Have performance evaluations been reviewed to identify any gender bias—for instance, bias against staff who take parental leave or utilize flexible work? Do staff performance evaluations include gender integration in their KPIs?

“Some leadership behaviors, which are more frequently applied by women than by men in management teams, prove to enhance corporate performance and will be a key factor in meeting tomorrow’s business challenges. Hence, promoting gender diversity and leadership variety is of strategic importance for companies.”

Source: McKinsey & Company, Women Matter 2.

Deliverables

- a. Gender audit methodology
- b. Gender audit draft: The draft should include the following components:
 - i. Introduction: Introduce company, business case for gender equity, context for the gender audit, initiatives and programs already underway, management support, and plans for follow-up and implementation based on the audit.
 - ii Summary of staff interviewed and their business units, along with the methodologies used.
 - ii. Summary of findings and recommendations: Summary of key findings and recommendations for addressing main challenges and opportunities.
 - iii. Results by business unit and priority area, as outlined in the scope of work, along with additional findings.
 - iv. Detailed evaluation and proposed follow-up steps
- c. Finalized gender audit: After incorporating company feedback during review process, provide a revised finalized version of the audit.

Reporting

[Identify a contact person within the company to whom the gender auditors will report and who will serve as point person for questions.]

Timeline

[Identify the timeline for the entire job and for each of the specific deliverables.]

TOOL 1.3: Develop a Business Case for Gender Diversity

- ▶ **GOAL:** Build support for gender-smart solutions
- ▶ **TARGET UNIT:** Gender Equity Champion

Conducting a gender audit can help a company identify areas of concern, opportunities for improvement, and strengths on which to build. It can also help a company to understand areas where the company can make improvements to maximize gender diversity in the workforce. These findings can form the core of a business case highlighting reasons that attention to these issues will have positive impacts on the company. This business case, specific to your company, can be used in discussions with senior management, staff, shareholders, and other stakeholders. It showcases the potential business advantages of the gender audit and can form the basis for conversations with management, staff, and stakeholders.

The formulation of the business case will also contribute to the development of a gender equity strategy (see Tool 1.4 for more on this). The strategy transforms the business case into a concrete action plan, prioritizing tools and identifying the steps needed to make the changes identified in the gender audit.

The business case can include the operational reasons that gender diversity will make the company more profitable, innovative, and better integrated into the community. It can draw on industry and legislative commitments or requirements, such as the Women's Empowerment Principles,⁵¹ corporate social responsibility commitments, and any applicable local and national laws and regulations.

The following steps are based on the IFC publication, *Investing in Women's Employment: Good for Business, Good for Development*.⁵²

Step 1. Identify the drivers for gender diversity and equality.

What are the key drivers for improving gender diversity and equality in your company? Here are several common reasons for undertaking a gender diversity-improvement initiative:

- **Performance and profitability opportunities:** Among the business case drivers are profitability gains from a more gender-diverse workforce, as demonstrated by innovation, productivity, condition of equipment and materials. Specific policies that can bring specific benefits to working women, such as improved childcare offerings, or more support for flex-work or family leave, can also positively impact profit and efficiency.

⁵¹ The Women's Empowerment Principles were developed by UN Women and the United Nations Global Compact to provide guidance to the private sector on empowering women. More information on the WEP can be found here: <http://www.unwomen.org/en/partnerships/businesses-and-foundations/womens-empowerment-principles>.

⁵² IFC, *Investing in Women's Employment: Good for Business, Good for Development*, 20.

- **Sustainability:** Has the company made commitments to diversity in the workforce, or for local hiring? Increased gender diversity can help meet these commitments and improve company integration within the community.
- **Industry commitments:** Has the company signed on to industry or other initiatives with commitments on gender diversity, such as the Women’s Empowerment Principles? Developing a gender diversity strategy and targets will help companies meet these commitments and improve their competitive ranking compared to other industry players.
- **Legislative requirements:** Do the laws in the host country require a certain level of gender diversity or local employment? A proactive gender diversity strategy can help companies stay on top of both required and voluntary commitments.



Step 2. Develop the business case.⁵³

While the gender audit can help to identify key areas for improvement and strengthening, additional measurement will be needed to show the business benefits from making these changes. The goal of the business case is to demonstrate how changes in specific gender metrics could impact core business outcomes; however, showing a causal and specific relationship can be difficult, especially when other variables are in play, such as rising or falling mineral prices, or changes in resources or the operating environment. It can be particularly difficult to make short-term attribution (for instance, that a change in senior management had an immediate effect on profit), or to demonstrate longer-term impacts (for instance, how a strengthened gender diversity policy impacts reputation). And yet, developing a strong business case is important both for building buy-in and for demonstrating the importance of making gender equity a core business principle rather than a stand-alone initiative.

Of note: demonstrating the value of women’s participation should not be about comparing men’s and women’s performance. Rather, it should focus on the benefits of gender equity and diversity—how creating equal opportunities for men and women can benefit the company.

⁵³ The information in Step 2 draws on: IFC, *Investing in Women’s Employment*, 49–58.

To develop an effective business case, the following process is recommended:

- **Identify the intervention:** Based on the gender audit, identify specific areas or initiatives of focus, such as increasing the recruitment of women, improving safety of on-site accommodation, or changes in family-leave policies. The more specific the initiative being examined, the easier it will be to determine the potential impact of changed policies.
- **Develop a baseline:** For every initiative, develop a baseline—where the company is now—and determine how the business case will be presented. Options include the before-and-after approach that looks at a change in performance over time, or the with-and-without approach that looks at the performance of various business units that have adopted the proposed initiative compared to those that did not.
 - » Developing the baseline and collecting relevant data will require the buy-in of various business units. Depending on the intervention, this could include finance and HR, among others.
 - » Determine how the initiative will be measured, using employment and business metrics. For instance, an initiative focused on increasing gender diversity in employment should feature employment metrics on the number of women and men employed in various job families and at various levels. Business metrics will be determined based on the company’s core business objectives, but should be tied to quantitative or qualitative indicators that demonstrate a change in its ability to meet key business targets. Part of this effort involves identifying the availability of relevant information, such as gender disaggregation of jobs at various levels—or whether work to gather data is required.
 - » Identify relevant costs and benefits: Determine the anticipated costs of implementing an intervention compared to doing nothing as well as the potential benefits it may bring. For instance, for a proposed intervention to provide on-site childcare, identify the costs of not implementing it, such as loss of productivity when staff need to care for their children, potential attrition as employees who need to care for children quit, and the cost of recruiting and training replacement staff. Compare these implications to the costs of implementing the initiative, such as the cost of facilities and childcare staff, as well as the benefits of the proposed intervention, including improved productivity, increased employee satisfaction and reduced turnover.
- **Develop an evaluation methodology and conduct analysis:** Determine how costs and benefits will be measured. Options include using currently available data and conducting staff surveys or interviews, among others.

“Companies with the best record of promoting women to high positions enjoy 18–69% more profitability.”

—Roy Adler

Source: “Women in the Executive Suite Correlate to High Profits”

- **Compare costs and benefits:** Once costs and benefits have been identified, collected, and quantified, determine the return on investment of a particular initiative:

$$\frac{\text{Benefits} - \text{Costs}}{\text{Costs}} \times 100 = \text{Return on Investment}$$

A positive—or even neutral—return on investment can be a powerful tool in negotiating for gender diversity and equality initiatives.

- **Compile the business case:** A presentation-ready business case should include discussion of the proposed intervention and its objectives, any assumptions or estimates for the proposed program, discussion of methodology, ROI analysis, and any case studies or examples to support the case for proposed interventions. Also include recommendations on ways to move forward, whether or not additional assessments might be needed, and implementation options.

Step 3: Use the business case to mobilize support.

Once the business case has been developed, it should be shared and used to gain management and stakeholder commitment and buy-in for the next steps in the process.

- **Mobilize management support:** Support from the CEO and the senior management team is essential for a successful gender diversity strategy. They will set the tone for how the strategy is received and implemented. So, it is important that they share their commitment publicly. They must send the message to all staff that gender diversity is both the right thing and the smart thing to do for the business. They also must let everyone know that managers and all staff will be held accountable for gains in gender diversity. In addition, the management team has to back up this verbal commitment with tangible engagement in the gender diversification process.
- **Communicate strategy to stakeholders:** Ultimately, CEOs and executive boards answer to their shareholders. So, the support of shareholders and other stakeholders (such as the community and local unions) is critical to the success of gender diversity initiatives. Once the business case for gender diversity has been developed, the process of communicating with stakeholders can begin. News about upcoming activities such as the gender audit and progress on the gender diversity strategy and targets will keep them informed. Be sure to include tie-ins to ways these initiatives will help the company meet its performance, profit, legislative, and industry objectives.

TOOL 1.4: Establish a Gender Equity Strategy

- ▶ **GOAL:** Create a gender-equitable work environment for both men and women across the company
- ▶ **TARGET UNITS:** Senior Management, Training, Human Resources, Gender Equity Champion

The gender equity strategy is the foundation for any gender diversity improvement initiatives you have in mind. It provides the structure for gender equity commitments, actions, and progress monitoring. The strategy should lay out objectives, coordinate activities, and clarify accountability. It should frame clear targets, time-bound goals, and the pathway towards those goals. It should be based on the findings of the gender audit. It also should reinforce the business case by detailing a concrete set of actions that will help the company address shortcomings identified in the gender audit as well as help to realize the gains outlined in the business case. Among the advantages of a gender equity strategy:

- **Unified vision:** The 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 held to the same standard. It also enables teams to learn from others' experiences.
- **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: Develop a gender equity task force.

This task force should include a gender equity champion (see Tool 1.5), a representative from the human resources department, and point persons from each business unit, creating an organization-wide team responsible for gender mainstreaming. Depending on company size, country-level

and departmental task forces might be needed as well to support implementation. These supplemental task forces should include representatives from all job grades. Among the responsibilities of the gender equity task force are developing a draft gender equity strategy, establishing targets, managing monitoring and accountability for targets, and communicating with senior management about progress and necessary course corrections.

The gender equity champion leads the task force. This individual is accountable for the task force, with primary responsibility for implementing the activities detailed here. These responsibilities include:

- Managing task force meetings
- Recording and sharing proceedings
- Leading the development of the gender equity strategy and target setting, as well as the implementation of related activities
- Leading/managing the monitoring and evaluation of progress towards targets
- Acting as point person for all contracted work, such as for a gender audit or pay gap review
- Documenting progress of gender equity initiatives
- Working with the communications team to ensure that progress is shared with employees, management, and stakeholders

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

These goals are a precursor to more specific gender targets and should focus on the company's vision for gender diversity. The goals should reflect discussions on the business case: what did the gender audit highlight as key areas in need of improvement? How does senior management endorse and prioritize activities, for maximum impact on the company? How does this fit into the company's larger diversity and inclusion efforts? For many companies, gender is one of several diversity and inclusion goals.

In setting these goals, there are several 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 1-E to help you rank priorities: High (H), Medium (M) or Low (L).⁵⁴

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

⁵⁴ Adapted from: Australian Government Workplace Gender Equality Agency, *Gender Strategy Toolkit*, Sydney: Australian Government, 40.

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.⁵⁵

TABLE 1-E Ranking Gender Diversity Priorities

| POTENTIAL PRIORITY AREAS | PRIORITY RATING | PROGRESS TO DATE |
|-----------------------------------|-----------------|------------------|
| Stakeholder Management | | |
| Leadership Accountability | | |
| Strategy and Business Case | | |
| Measuring and Reporting | | |
| Policies and Processes | | |
| Supply Chain | | |
| Leadership and Manager Capability | | |
| Talent Pipeline | | |
| Flexibility | | |
| Gender Pay Equity | | |
| Gender Composition | | |
| Gender Inclusive Culture | | |

Step 3. For priority goals, set specific targets.

Based on Step 2, identify key gender equity targets for each priority goal (see Tool 1.11 for guidance on target setting). Develop draft targets to align with key corporate goals.

Figure 1-A below is a “Gender Equity Continuum.” It can help you set targets, 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.⁵⁶

FIGURE 1-A Gender Equity Continuum



⁵⁵ Australian Government Workplace Gender Equality Agency, *Gender Strategy Toolkit*, 39.

⁵⁶ Australian Government Workplace Gender Equality Agency, *Gender Strategy Toolkit*, 39.

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 Tables 1-F and 1-G.⁵⁷

TABLE 1-F Model Gender Equity Strategy Targets

| | MANAGERS | ENGINEERING | MEDICAL | HUMAN RESOURCES | TRAINING/ CULTURE CHANGE/ COMMUNICATIONS |
|---------------------|--|--|--|---|---|
| Outputs | | <ul style="list-style-type: none"> ▶ # of change houses built ▶ # of underground toilets installed ▶ # of appropriate safety equipment issued | <ul style="list-style-type: none"> ▶ # of jobs assessed for women | <ul style="list-style-type: none"> ▶ # of policies developed/updated ▶ # of women assisted with childcare | <ul style="list-style-type: none"> ▶ # of hours training provided on gender bias ▶ # of participants in trainings and workshops ▶ # of people reached through communications efforts |
| Outcomes | <ul style="list-style-type: none"> ▶ # of women employed by the company ▶ % of women employed by the company ▶ Female vs. male attrition rates | | | | |
| Anticipated Impacts | <ul style="list-style-type: none"> ▶ 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 strategy.

Based on the key goals and targets identified, outline a strategy that effectively states how the company will achieve these goals, by whom, and by when. The strategy should be a simple, straightforward document that includes the following sections:⁵⁸

- **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 1-G for an example.

⁵⁷ IFC and Lonmin, *Women in Mining: A Guide to Integrating Women into the Workforce*, 17.

⁵⁸ Australian Government Workplace Gender Equality Agency, *Gender Strategy Toolkit*, 42.

- **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.
- **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 for all staff across the organization on the strategy. 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 1-G Example of a Gender Equity Strategy Outline

| KEY FOCUS AREA | SPECIFIC TARGET | RESPONSIBLE UNIT | STRENGTHS AND THREATS TO SUCCESS | MEASURING PROGRESS | TIMEFRAME | RESOURCES NEEDED (SUCH AS FINANCIAL STAFF TIME) |
|----------------|---|------------------------------------|---|--|-----------------------|---|
| Recruitment | At least 20 percent of job shortlist candidates are women | Human Resources and business units | <p>Strengths: Improved outreach activities, and gender-inclusive recruiting can support success</p> <p>Threats: Lack of female candidates</p> | Quarterly review of total applicants, shortlists, and final candidates | Effective immediately | Budget, staff time, consultants |

TOOL 1.5: Terms of Reference for a Gender Equity Champion

- ▶ **GOAL:** Lead and coordinate gender mainstreaming efforts
- ▶ **TARGET UNITS:** Human Resources and Senior Management

ABOUT THE GENDER EQUITY CHAMPION

The gender equity champion is the company's lead on gender diversity and equity initiatives. The champion directs some activities, and serves in a coordinating role for others. This individual—preferably a person with a decision-making role—is responsible for implementing the business case and the gender strategy. The role of the champion includes:

- Gaining buy-in from senior management and other key players in support of the gender equity messaging
- Working with business units such as HR, procurement, and community engagement to develop unit-specific gender action plans
- Helping teams to implement their gender strategies
- Providing organization-wide coordination
- Assisting with external messaging on the company's gender commitments



Tool 1.5 outlines the main responsibilities of the gender equity champion in a ToR. While certain in-house staff might qualify for this position, be sure to allot time to do the job, rather than adding the role to existing full-time responsibilities. At a minimum, the champion's job should be considered a half-time position and there is a strong argument for designating it as a full-time position.

The champion role is not meant to substitute for subject-matter gender expertise in business units (i.e. gender expertise among community development experts or gender-based violence experts to conduct GBV assessments). Rather, the intent is to designate an individual to lead and coordinate implementation of the gender strategy across the organization.

In terms of seniority, the champion should rank in upper-middle management at a minimum. If the champion is not a senior manager, a board director should be designated to provide senior-level support and traction for the champion's proposals and work.

SAMPLE TERMS OF REFERENCE FOR A GENDER EQUITY CHAMPION

Introduction

Outline the reasons [*Company*] wants to hire a gender equity champion. Introduce steps taken to date on laying the groundwork for a gender equity strategy or program. Describe the gender equity commitments that underpin the hiring of a gender equity champion—for instance, commitments to increase recruitment of women, engage with more women-owned businesses, or ensure equitable consultation and engagement with male and female community members. Provide the corporate context and reporting lines: will the champion have a team or an office? To whom does the champion report? Has the champion’s work program been defined or are plans in place to do so?

The objective of the Gender Equity Champion position is to have a corporate focal point who can provide leadership and coordination to help [*Company*] improve equity of opportunities for men and women within [*Company*] as well as in [*Company*’s] interaction with suppliers and the community. The champion will be responsible for developing [*Company*’s] gender equity strategy, securing buy-in within the company, and working across business units to support the implementation of the strategy.

Scope of Work

The gender equity champion’s responsibilities will include the following:

1. Facilitate corporate agenda-setting for gender:
 - a. Identify drivers for gender diversity and develop a business case for gender equity:
 - » Identify key drivers for improving gender diversity within the company, such as performance and profitability, corporate social responsibility, industry commitments, or legislative requirements.
 - » Explore and consolidate these drivers into a company-specific business case for gender equity. This business case should outline ways in which improvements in gender diversity and progress toward gender equity will—or will have the potential to—create business benefits for [*Company*].
 - b. Cultivate senior leadership support for gender equity:
 - » Meet with senior leadership to present the business case for gender equity
 - » Work with senior management to secure their commitment to support gender equity
 - c. Form a gender equity task force: The company’s gender equity task force will be responsible for developing a draft gender equity strategy, establishing targets, managing monitoring and accountability for targets, and updating senior management on progress and necessary course

corrections. This task force should include the gender equity champion, human resources, and point persons representing every business unit, including communications and marketing, to create an organization-wide team responsible for gender mainstreaming. Depending on the size of the company, country-level and departmental task forces can be developed to support implementation, which should include representatives from all job grades. The task force itself should include male and female members.

- d. Assume the lead role in the task force. Duties here will include:
 - » Managing task force meetings
 - » Recording and sharing proceedings
 - » Leading the development of the gender equity strategy and targets, as well as being accountable for implementation of related activities
 - » Leading/managing the monitoring and evaluation of progress toward targets
 - » Acting as point person for all contracts, such as for the gender audit or pay gap review
 - » Documenting progress of gender equity initiatives
 - » Working with the communications team to ensure that progress is shared with employees, management, and stakeholders
 - e. Lead the development of the gender equity strategy through the gender equity task force:
 - » This strategy should provide the structure for commitments, actions, and monitoring progress towards gender equity. The strategy should lay out objectives, coordinate activities, clarify accountability, and frame clear targets, time-bound goals, and the pathway towards those goals.
 - » This strategy should establish company-wide goals for gender equity and diversity. These goals are a precursor to more specific gender targets and should focus on the company's vision for gender diversity. They should be discussed and validated with management and relevant business units, to ensure widespread understanding, support, and buy-in for the goals.
 - f. Support HR in the development and rollout of corporate-level gender equity/diversification programs.
 - g. Work with HR on a corporate-wide campaign to address sexual harassment and gender-based violence [*as necessary*].
2. Disseminate the gender equity strategy to all business units and support implementation across [*Company*]:
 - a. Identify operational champions in various business units.

- b. Work with senior management and business units to implement the gender equity strategy:
 - » Presenting the strategy to teams
 - » Working with teams to identify where they fit into the strategy
 - » Helping teams develop unit-specific gender plans
 - » Supporting implementation of unit-specific gender plans
 - c. Provide input as business units conduct assessments on relevant topics, such as women in the workforce, in the supply chain, and in community engagement, to help teams consider gender dimensions, ensure continuity of corporate messaging and priorities across activities, and ensure as much coordination between departments as possible.
 - d. Support HR in identifying independent teams to conduct gender audit and pay gap study, where required.
 - e. Work closely with supply chain and community engagement teams to develop a business case for engaging with women-owned businesses and supporting a gender-equitable approach to community development.
3. Serve as internal and external point of contact for questions or support regarding [Company]’s gender equity strategy:
- a. In addition to serving as the internal point person on gender equity, the champion may be called on to represent [Company] publicly on matters related to the gender equity strategy.

In addition to these tasks, the champion will be responsible for developing additional activities as needed to support training on and implementation of [Company’s] gender equity strategy, as well as ensuring that individual business units can apply and act on the strategy.

TOOLS 1.6–1.8: Gender Diversity and Inclusion on Boards

ASSESS AND PREPARE, ADDRESS, MONITOR AND SUSTAIN

This section includes several tools that will help companies increase gender diversity and inclusion on their boards. It is divided into the three stages of an effective process:

- **Assess and prepare:** Tool 1.6 helps you gather a baseline understanding of what your board looks like today and identify actions needed to improve gender balance in the boardroom.
- **Address:** Tool 1.7 offers guidance on building a more gender-diverse board.
- **Monitor and sustain:** Tool 1.8 provides guidance on how to ensure that progress continues and improvements are sustained over the long term.



TOOL 1.6: Gender Diversity Board Assessment⁵⁹

- ▶ **GOAL:** Assess board gender diversity
- ▶ **TARGET UNIT:** Executive Board

A stocktaking of gender representation at the executive board level can help you determine what action is necessary to strengthen gender diversity. This exercise should examine the board's current gender composition. It should also look at the ways in which new board members are selected and the frequency with which new directors are chosen. In addition, it should examine the board's operational policies and procedures to evaluate women's ability to participate in board activities.

An independent consultant should conduct the stocktaking exercise and present the results to the board. The company and its shareholders should have access to the results, as well as to action plans that address issues identified.

Here are some suggested questions to include in a board stocktaking exercise on gender.

On Board Composition:

- What is the ratio of women to men on the board in executive and non-executive positions (including chair, deputy chair, treasurer)?
- What is the ratio of women to men in decision-making positions on the board?
- What is the ratio of women to men on the board?
- How long has each member been on the board? TIP: Map change in gender diversity over time (for instance, at 5 year intervals). Compare with board performance and company performance over time.
- What are the individual qualifications/backgrounds of board members?

On Board Operating Procedures:

- Is there a policy on board gender diversity?
- How often is board performance assessed?
- How are board members' performance measured?
- Does the nominating committee (or the committee responsible for ensuring gender diversity) have a clear reporting obligation to the board?

⁵⁹ This tool was adapted from a range of existing board checklists, including the Australian Institute of Company Directors' *Checklist for Assessing Board Composition*, Sydney: AICD, 2016, and draws on resources including: International Corporate Governance Network, *ICGN Guidance on Gender Diversity on Boards*, London: ICGN, 2013.

On Protocols for Replacing Board Members:

This is a qualitative assessment of how the board is composed, whether there is impartiality in board member selection, and how key skills are evaluated.

- How often are new board seats available?
- Are there term limits?
- If there have been any changes, such as moving from no term limits to term limits, how has this changed board composition and impacted company performance?
- What is the protocol for selecting new members?
- How diverse are the networks and mechanisms through which new candidates are considered and selected?
- Is there gender bias or imbalance in the networks/avenues through which potential candidates are identified?
- Does the board have in place a skills matrix to identify and address any skills gaps through board member recruitment?
- If the skills matrix exists, how often is it updated?

By gathering responses to these questions, companies will have a better overview of the level and extent of the current board's gender diversity and whether there are policies or board self-assessments in place to support increased gender diversity. Analysis of the results will highlight gaps and reveal areas to address, monitor, and sustain.

TOOL 1.7: Checklist for Building a Gender-Diverse Board

▶ **GOAL:** Increase board gender diversity

▶ **TARGET UNIT:** Executive Board

The checklist that follows can help improve gender diversity on boards by changing the way in which candidates are identified, selected, and held accountable for performance. The strategies listed here are designed for boards but can also be used across the organization, as led by the board. Based on the findings of Tool 1.6, you can customize this list according to your needs.⁶⁰

- **Develop a strategy for improving gender diversity on the board:** Activities can include any of the actions listed here, outlined with clear timelines and accountabilities. They should align with gender diversity policies in the company.
 - » Formalize a commitment to achieving gender diversity on the board. This does not have to include a quota, but the chairman of the board should be encouraged to make a public or internal commitment to gender diversity and hold board members accountable.
 - » Commit to minimum gender diversity targets in candidate pools.
 - » Require search firms to meet minimum gender diversity targets in their proposed candidate pools.
 - » Require the nominations committee to report on measures taken to address gender diversity in the recruitment process.
 - » Adopt long-term strategies to support development of a gender-diverse pool of candidates. This can include identifying mechanisms through which the board can proactively support the development of future female board candidates, for instance by developing mentorship, training, and networking opportunities that reach out to female candidates.
 - » Appoint a board-level champion for this work.
- **Monitor and modify board practices to support gender diversity:**
 - » Maintain an up-to-date skills matrix for necessary board member skills, keep an updated record of how current board members' skills complement the matrix, and use this record to guide recruitment of new board members.
 - » Consider term limits for board members to promote turnover and potentially disrupt social networks that often favor men over women in senior management and corporate governance positions.

⁶⁰ This checklist draws on the ICGN guidance.

- » Provide board member training to increase awareness of the importance of gender diversity and the benefits for the company at all levels.
- » Include gender diversity as a key agenda item and in KPIs of the board as a whole and of individual board members.
- **Promote gender diversity throughout the company:** As noted, the board’s gender diversity strategy should align with the company’s organization-wide gender diversity strategy. The board should also take responsibility for assessing gender diversity in senior management, as well as reviewing gender diversity measures across operations.
- **Collaborate for improvement:**
 - » Network with other companies to discuss successes and challenges with gender mainstreaming.⁶¹
- **Develop metrics for board performance:**
 - » Identify metrics to monitor performance of the board as a whole, as well as of individual members. These can include attendance, likelihood of sanction for non-performance, and company performance. Share the metrics and communicate results to shareholders.
 - » Demonstrate public accountability for gender diversity on the board and commit to transparency.
- **Make a public commitment:**
 - » It may take time to develop a pipeline and identify suitable candidates for a gender-diverse board. Still, boards can start the process immediately by adopting a commitment to gender diversity and communicating this commitment in board documents and other key corporate reporting formats.
 - » Disclose current gender diversity status and action plans for improving gender diversity at the board level and in annual reports to shareholders as well as throughout the organization.

⁶¹ Catalyst, “Leader to Leader: How to Transform the Boardroom from the Inside,” New York: 2014.

TOOL 1.8:**Checklist for Monitoring and Sustaining Gender-Diverse Boards**

- ▶ **GOAL:** Increase board gender diversity
- ▶ **TARGET UNIT:** Executive Board

After the initial stocktaking and actions to increase gender diversity on boards, use the following activities to monitor and sustain progress towards a gender-equitable board.

Monitoring and Sustainability Stocktaking

Conduct stocktaking at defined intervals, as appropriate, depending on board size and turnover. This exercise should look at:

- The level of gender diversity on the board, including ratio of women to men in decision-making roles
- Improvements in gender diversity in shortlists for recent board positions
- Existence of board-level gender diversity policy
- Presence of a board committee dedicated to monitoring and enacting the gender diversity action plan: How often does it meet? How is it held accountable?
- Existence of regular board communication with the company and shareholders about progress on the gender diversity action plan
- Existence of routine board evaluations, for the board as a whole and of individual board members: Are members being held accountable for their performance?

Periodic Actions

These actions should take place on a periodic basis to ensure that the gender diversification strategy remains the right fit for the organizations.

- Review skills matrix to ensure fit with current board needs
- Review board member skills
 - » Compare against skills matrix
 - » Identify new gaps that may have emerged
 - » Identify gaps that were filled through changes in board membership
- Review gender diversity action plan
 - » Ensure alignment between board plan and company-wide policies

- Report results of gender stocktaking and progress on gender diversity action plan
 - » Include board and company-wide results
 - » Report to shareholders
 - » Communicate results throughout the company

BOX 1-C Monitoring Gender Performance as Part of Sustainability Reporting

The Global Reporting Initiative is an international multi-stakeholder network housed in the United Nations Environment Program.

GRI has developed a widely used framework for sustainability reporting. It includes gender as a key dimension for reporting, to understand gender distribution and to maximize use of labor and talent. Gender is incorporated in GRI's reporting standards on:

- Executive committees
- Employees
- Employment type
- Wages
- How employees use parental leave
- Injuries
- Occupational diseases
- Absenteeism and work-related fatalities
- Employee training
- Performance evaluations
- Incidences of discrimination and corrective actions taken
- Gender considerations in social impact assessments

For executive-level responsibilities, GRI requires reporting on the composition of the highest corporate governance body and committee by gender (For more, see Consolidated Set of GRI Sustainability Reporting Standards 2016).

TOOLS 1.9–1.16: Gender Diversity in Senior Management and Staff

ASSESS AND PREPARE, ADDRESS, MONITOR AND SUSTAIN

This section includes several tools that will help you increase the number of female senior managers and staff in your workforce. As with the previous section, it is divided into the three stages of an effective process: assessing and preparing, addressing the issue, and monitoring and sustaining progress.

- **Assess and prepare:** Identifying and assessing key issues influencing gender diversity at all levels of the company is an important first step. Tool 1.9 provides guidance on designing an assessment that looks at all the issues influencing recruitment and retention of talented female staff—including any potential gender-related barriers to promotion.
- **Address:** Now that you have developed a baseline understanding of where you stand on gender equity, it is time to take action. Tools 1.10–1.15 provide guidance on improving the gender diversity of your workforce. Tools are organized by goal—recruitment, retention, and promotion—with an indication of the business units responsible for the proposed activities.
- **Monitor and sustain:** Developing strategies to monitor progress—as well as the effectiveness of training programs—will help ensure good returns on your gender diversity initiatives investments and that you have tangible evidence of improvement. Tools 1.15–1.16 provide guidance on monitoring and sustaining improvements.

“We need decent, powerful men to step up beside women to create a more gender equal world. The Male Champions of Change strategy is about male leaders advocating for and acting to advance gender equality. As one of the Male Champions of Change said: ‘Let’s not pretend that there aren’t already established norms that advantage men. Men invented the system. Men largely run the system. Men need to change the system.’”

— Elizabeth Broderick, former sex discrimination commissioner, Australia, and founder, Male Champions of Change

TOOL 1.9: Terms of Reference for Pay Gap Study

- ▶ **GOAL:** Identify bias in compensation
- ▶ **TARGET UNIT:** Human Resources

To attract and retain a gender-diverse workforce, potential candidates need to be confident that they are being paid fairly for their work. “Equal pay for equal work” means that men and women will receive the same pay and same conditions for work of the same or similar job descriptions, and/or for jobs requiring similar levels of skill or qualification.⁶² Pay equity is not only the right thing, it makes good business sense: paying all candidates equitably is important for retaining high performers, and developing a strong senior management pipeline.⁶³

BOX 1-D Defining the Gender Pay Gap

The International Labour Organization has developed a definition to describe gender inequalities in pay. According to the ILO:

The gender pay gap measures the difference between male and female average earnings as a percentage of the male earnings. Overall, features such as differences in educational levels, qualifications, work experience, occupational category and hours worked account for the “explained” part of the gender pay gap. The remaining and more significant part, the “unexplained” portion of the pay gap, is attributable to the discrimination—conscious or unconscious—that is pervasive in workplaces.

For more, see the ILO publication, *Pay Equity: A Key Driver of Gender Equality*.

Pay and related compensation should be set by the job function, not by the individual performing it. Bonus pay should be awarded according to a clear and transparent system, so that all staff understand the basis and metrics for bonus pay.⁶⁴

A pay gap survey can help you identify differences in the ways in which men and women are being compensated for equivalent work. You may not even realize that you have a gender-related imbalance in pay, so pay gap surveys can be valuable tools for identifying and addressing issues. These surveys also can help to uncover other biases, such as lower wages for minority or local

⁶² International Training Centre of the ILO, *Break Gender Stereotypes: Give Talent a Chance*, Brussels: European Commission, 2008, 54.

⁶³ ILO, *Pay Equity: A Key Driver of Gender Equality*, Geneva: ILO, 2015, 1.

⁶⁴ ILO, *Break Gender Stereotypes: Give Talent a Chance*, 54.

women. Pay gap surveys and follow-up actions are a straightforward way for companies to ensure that they can:

- Recruit and retain a diverse workforce
- Demonstrate a commitment to addressing gender imbalance
- Highlight their commitment to transparency, gender equity, and diversity

As part of planning your assessment, consider ways to make information available to employees and actions to take if pay gaps are revealed. Some countries are moving towards mandating transparency around pay gaps: Australia Germany, Austria, and Belgium have passed laws requiring companies of a certain size to publish pay gap information. The U.S. adopted a similar law in 2016. The U.K. is requiring companies with more than 250 employees to publish pay gap information by April 2018.⁶⁵

Pay gap assessments can be complex and difficult. They require a look at multiple factors to identify areas in which men and women receive unequal pay for equal work. The model terms of reference provided here details the specific steps required to undertake such an assessment, which can be used for both internal and external purposes. The proposed approach divides the work into two main tasks, as follows:

- **Conduct a quick baseline on pay equity:** This can be incorporated as part of a broader gender audit, or can be conducted independently. Use these questions to build this baseline of the company's status on pay equity:⁶⁶
 - » Is there a policy on equal pay for equal work?
 - » How have staff been informed of this policy?
 - » Is someone within the organization responsible for implementing this policy?
 - » Has the job evaluation metric been reviewed for gender bias?
 - » Has a pay gap review been conducted in the past to identify gaps in pay for equivalent work?
- **Conduct a pay gap survey:** The survey is a deeper dive to identify jobs or job families where men and women are not earning equitably. It helps uncover challenges or bottlenecks getting in the way of equal pay for equal work. The survey should identify target areas for improvement and potential actions to take. See below for a model terms of reference for a consultant who could conduct the survey, with the goal of identifying jobs or job families within the company in which men and women are not earning equal pay for equal work.

⁶⁵ Lucy Meakin, "Britain's Gender Pay Gap is Under the Spotlight," *Bloomberg Business Week*, July 31, 2017 and UK Government, "Gender Pay Gap: Closing it Together," <https://genderpaygap.campaign.gov.uk/> (Updated December 1, 2017).

⁶⁶ Irish Congress of Trade Unions, *Negotiating for Equality— Gender and Pay Toolkit*, Dublin: ICTU, 37.

BOX 1-E Are Your Male and Female Employees Earning Equal Pay for Equal Work?

Not sure? Here are two methodologies to help you find out:

- ILO's *Gender-Neutral Job Evaluation for Equal Pay* provides a step-by-step guide for companies to compare jobs and evaluate their value, based on a number of gender-neutral qualifications. This objective assessment of positions is a necessary step in the gender audit, to ensure that jobs typically held by women are not under-valued. For more see: ILO publication "Promoting Equity"
- **Logib:** The Swiss Federal Office for Gender Equality has developed the Logib statistical tool for company self-assessments. To complete the assessment, you will need to input pay, qualifications, and employment profile data for all employees. The tool is available for free download. Download the tool: <https://www.ebg.admin.ch/ebg/en/home/services/equal-pay-self-test-tool--logib.html>

MODEL TERMS OF REFERENCE FOR A PAY GAP REVIEW

Introduction

[Outline rationale for conducting a pay gap review. Introduce steps taken thus far to develop a business case for gender equity, as well as other actions such as gender audits, management support, education and staff awareness-raising. Explain the context for the pay gap review and how results will be used.]

Consultants retained to conduct the pay gap review will be called the “consultants” for the purposes of this ToR.

Objective

The objective of the pay gap review is to identify gender-based disparities in compensation—including salary, benefits, and bonuses—awarded to men and women who hold equivalent jobs in the company. The review will identify gaps, try to identify the drivers of the disparities, and make suggestions for addressing the disparities.

Scope of Work

The assessment will involve the following activities:

- Evaluate jobs across the organization to determine jobs of same or similar job descriptions, and/or jobs requiring similar levels of skill or qualification, so that jobs and salaries can be compared.
- Based on the jobs assessment, develop a methodology for evaluating salary data between and across job families to analyze salary by job and by gender and identify trends and pay disparities. Data should be controlled for years at the company, but findings should be analyzed by gender, age, and role. If the company wants to assess race-based pay gaps, data can

also be analyzed for ethnicity, race, and other relevant metrics. Data should be disaggregated between local and international hires and among work sites to highlight potential differences between headquarters and country offices, and from country office to country office.

- c. Analyze findings to identify pay biases or trends based on gender.
- d. Identify areas of gender bias, versus gender-correlated trends: For instance, is there a trend towards lower salaries for women because of gender bias or because many women have taken time out from working for family reasons, meaning fewer years of experience? The analysis should explore the extent to which such trends are justified as well as identify situations in which there is truly unfair bias, with no basis in a business rationale.
- e. Identify challenges and opportunities for addressing gender-based pay disparities.

Deliverables

- a. Pay gap review methodology
- b. Pay gap review draft, to include the following components:
 - i. Introduction: Introduce the company, business case for gender equity, context for the gender audit, initiatives and programs already underway, management support, and plans for follow-up and implementation based on the audit.
 - ii. Summary of interviews conducted and business units reached, as well as methodologies used.
 - iii. Summary of findings and recommendations: Key findings and recommendations for addressing main challenges and capitalizing on opportunities.
 - iv. Results by business unit and priority area, as outlined in the scope of work, and any additional findings.
 - v. Detailed evaluation and proposed follow-up steps.
- c. Finalized pay gap review: Provide a final, revised version of the review that incorporates company feedback gathered during the review process.

Reporting

Identify a contact person within the company, to whom the consultants will report and who can respond to questions they may have.

Timeline

Identify timeline for the entire job, as well as for each of the specific deliverables.

TOOL 1.10: Review Recruitment Procedures

- ▶ **GOAL:** Developing a gender-equitable hiring process and increasing gender diversity and inclusion in the workforce
- ▶ **TARGET UNITS:** Human Resources, Communications

To attract and hire the best candidates, regardless of gender, a recruitment process free from gender bias is key. The process also needs to highlight the opportunities for male and female employees. Tool 1.10 helps you to identify and address areas of potential bias in the recruitment process, so you can be successful in attracting top talent of both genders.

ATTRACTING DIVERSE CANDIDATES

- Check job descriptions for biased terms or gendered language: Gender-inclusive terms are more likely to signal gender inclusivity, and opportunities for both men and women:⁶⁷
 - » Do job descriptions use gendered (such as foreman) or gender-neutral language (such as foreperson)?
 - » Do they use gender-inclusive terms (foreperson)?⁶⁸
- Revise job descriptions if necessary, to encourage gender diversity:
 - » Describe the job requirements, not the person who will fill the job (or previously filled it). For instance, for physically demanding jobs, describe the specific tasks, rather than describing a “physically fit” candidate.
 - » Clearly state required or desirable skills; state any formal training/qualifications required (but only require them when they are necessary for the job).
 - » Specifically state that the job is open to all.
 - » Highlight opportunities for career progression.
 - » Clarify whether a job requires standard on-site working hours, shift-work, and/or the potential for flexible work arrangements.⁶⁹
- Review job announcements, advertisements, and recruiting materials (such as print, television, and radio advertisements), for gender-biased language:
 - » Do they present a gender-diverse and inclusive image?

⁶⁷ ICTU, *Negotiating for Equality—Gender and Pay Toolkit*, 62.

⁶⁸ Australian Human Rights Commission, *Women in Male Dominated Industries: A Toolkit of Strategies*, Sydney: Australian Human Rights Commission, 2013, 22.

⁶⁹ ILO, *Break Gender Stereotypes: Give Talent a Chance*, 50.



- » Are men and women featured?
- » Are both men and women featured in operational roles?
- » Are women featured in “non-traditional” roles?
- » Do voice-overs in radio and television feature both men and women?
- » Do the advertisements communicate that men and women can advance across a range of job families?
- Revise job advertisements and materials to present a more gender-inclusive and diverse image:
 - » Include men and women in a variety of roles.
 - » Use men’s and women’s voices.
 - » Highlight career development potential for both men and women.
- Review job applications for questions that may prompt gender bias:
 - » Applications should only ask for relevant information—and not request details such as marital status or age.
 - » Applications should include opportunities for candidates to highlight previous formal and informal work experiences that support their ability to do the job.⁷⁰
- Review job selection criteria that may create bias. For instance, a question asking for years of experience might not directly impact skills or qualifications; however, it could put at a disadvantage male or female applicants who have taken time out of work for family reasons.⁷¹

⁷⁰ ILO, *Break Gender Stereotypes: Give Talent a Chance*, 50.

⁷¹ ICTU, *Negotiating for Equality—Gender and Pay Toolkit*, 62.

SELECTING THE RIGHT CANDIDATE: ADDRESSING BIAS IN SELECTION⁷²

- Ensure gender diversity in recruitment/selection teams: Selection teams should include at least one male and one female of equal seniority.
- Conduct bias training with HR and selection teams: This will help to identify and combat hidden biases, such as what work is appropriate for women, or how periods of absence from the workforce are judged. Ensure all members of selection teams are aware of relevant legislation related to non-discrimination.
- Test HR staff and selection teams for implicit bias: The Harvard Women and Public Policy Program's Implicit Associations Test can help identify unconscious biases, such as associations between women and men and different types of work.
- Develop a standardized, transparent recruitment process: This will ensure that all applicants have equal opportunity. Providing detailed criteria for all advertised positions will reduce reliance on subjective questions of "proper fit."
- Set minimum targets for the number of shortlisted female candidates: If you are using a recruitment firm, make sure the firm knows about the targets and is held accountable for meeting them.
- Develop a policy on appropriate interview questions: Avoid questions regarding marital status, children, intent to have children, or sexual orientation.

HIRING WOMEN CANDIDATES: SHOWING YOUR COMPANY IN THE BEST LIGHT

- Enable networking: Foster interaction between female candidates and female employees at all staff levels. Encourage discussion of opportunities for women in non-traditional roles.
- Highlight your company's emphasis on gender diversity: Inform all applicants of gender-related policies and programs in place, including HR policies, equal pay policies, female mentorship and leadership training, family-friendly policies.
- Request feedback from all applicants, particularly female applicants, to further improve the recruitment process.⁷³

⁷² This section draws on: Australian Human Rights Commission, *Women in Male-Dominated Industries: A Toolkit of Strategies*, and ILO, *Break Gender Stereotypes: Give Talent a Chance*.

⁷³ Australian Human Rights Commission, *Women in Male-Dominated Industries: A Toolkit of Strategies*, 38.

TOOL 1.11: Set Gender Recruitment Targets

- ▶ **GOAL:** Developing a gender-equitable hiring process to increase gender diversity and inclusion in the workforce
- ▶ **TARGET UNITS:** Human Resources, Communications

ABOUT GENDER DIVERSITY TARGETS

Gender diversity targets help companies measure progress towards gender equity goals. They increase coordination and strengthen commitment to meeting these equity goals. Targets can focus teams internally and enable benchmarking with other industry players.

While targets (and quotas) cannot address the underlying reasons for under-representation of women in particular parts of the workforce, they have been shown to be among the most effective means of addressing gaps in gender diversity.⁷⁴ “Targets with teeth” can significantly help companies to increase gender-equitable representation, especially at entry level. A three-year McKinsey study of 118 companies found that firms with targets were much more successful in recruiting entry-level female candidates than firms without targets.⁷⁵

Targets should be specific and challenging. In addition to quantitative metrics, they should include qualitative indicators of the ways in which people work together—for instance, targets that signal a more respectful workplace, more inclusive meeting practices, and more flexibility in work arrangements. Metrics also might include indicators like decreased absenteeism and turnover, and higher employee satisfaction.⁷⁶

GUIDE TO DEVELOPING GENDER RECRUITMENT TARGETS

This step-by-step guide will help you creating gender recruitment targets.⁷⁷ For examples of the kinds of targets to set, see Table 1-H.

1. **Secure leadership support:** Is senior management supportive of setting targets and involved in the target-setting process? To build broader support for meeting targets and create momentum for reaching the targets, senior managers must publicly endorse the effort. Are gender diversity gains included in senior management performance evaluations?

⁷⁴ Catherine Macdonald, *The Role of Gender in the Extractive Industries*, Helsinki: UNU-Wider, 2017, 19.

⁷⁵ Women in Mining Canada, *Welcoming to Women: Action Plan for Canada’s Mining Employers*, 23.

⁷⁶ Women in Mining Canada, *Welcoming to Women: Action Plan for Canada’s Mining Employers*, 23.

⁷⁷ These steps based on: Australian Government Workplace Gender Equality Agency, “How to Set Gender Diversity Targets,” Canberra: Commonwealth Government of Australia, 2013.

2. **Develop a gender equity strategy (Tool 1.4):** Targets should be part of a broader gender equity strategy that includes the steps that will be taken to develop a gender-diverse work environment, and the specific actions to help achieve the recruitment targets. Targets cannot exist in the absence of a strategy to help achieve them.
3. **Establish targets:** Targets should be clearly defined (i.e. target gender ratios for particular positions). They can include immediate goals and longer-term targets, but they must be achievable, with small, incremental steps to enable effective progress. Targets should be discrete and measurable—for instance, retention rates for women following maternity leave, rather than trying to measure vague indicators such as “inclusive culture” or “diverse workforce.” Be sure that targets are:
 - a. **Accountable:** Ensure that managers and staff have the ability to advance progress towards targets and are held accountable for meeting them.
 - b. **Manageable:** Ensure that the targets relate to outcomes, strategies, and tactics that managers can actually control, so that managers can realistically be held accountable for meeting goals.
 - c. **Realistic:** Goals should be reasonable and achievable.
 - d. **Specific to the organization:** Targets are a great way for companies to benchmark themselves within the industry, and can be a way to demonstrate commitment and distinguish performance. Fundamentally, however, targets should be about the needs and goals of the company itself, so they should be based on the results of the gender audit. They should incorporate the analysis of recruitment and turnover data, and identified bottlenecks for gender-equitable recruitment and retention.
4. **Review and refine targets:** The target-setting process should include representatives from different business units, including staff and managers. After draft targets have been set, review targets with key staff, to ensure understanding and buy-in.
5. **Publicly communicate targets:** In addition to external communication through annual and quarterly reports, targets should be shared internally with staff. Communications should include the business case for a gender-diverse workforce, a description of the target-setting process, and detail on how they will be achieved.
 - a. **Establish accountability:** Identify the ways in which business units and individual managers will be held accountable for meeting recruitment targets. Specify training for selection teams to counter any bias.
 - b. **Create incentives:** In addition to accountability and incentives for managers, setting team incentives can contribute to organization-wide staff buy-in on the gender diversity front.

- c. Set up reporting systems: Ensure that reporting systems will capture progress as well as the impact of changing gender diversity.
- d. Disaggregate reporting to the departmental and/or business unit level, and ensure reporting is publicized, within the organization, and to all stakeholders.
- e. Establish systems for routine review: Review findings on an annual basis and identify areas for change and improvement.
- f. Follow up with additional gender audits: Survey staff on issues of organizational culture, bias, and ways to increase opportunities for recruitment and retention of women.

TABLE 1-H Setting Targets⁷⁸

| TYPE OF TARGET | TARGET |
|--|--|
| Gender equity in employment | <ul style="list-style-type: none"> ▶ Improve ratio of women to men in a given department from X to Y in the next two years ▶ Increase ratio of women to men in senior management in the next two years ▶ Bring retention rates of mid-career male and female staff to parity within the next two years |
| Review HR policies and physical infrastructure | <ul style="list-style-type: none"> ▶ Review all job descriptions and recruitment materials related to positions in all departments for gender-discriminatory or discouraging language with the current fiscal year ▶ Review HR policies regarding ergonomics, personal protective equipment (PPE), workplace safety, and equipment to ensure that these consider differences in safety needs between men and women ▶ Ensure that all departments on site comply with HR policies on ergonomics, PPE, workplace safety, and equipment ▶ Renovate all toilet and shower facilities to be code compliant within the current fiscal year |
| Gender-inclusive work environment | <ul style="list-style-type: none"> ▶ In employee engagement surveys, improve parents' perceptions of acceptability of taking parental leave by XX percent: <ul style="list-style-type: none"> • Improve parity in perceptions on career development opportunities between male and female employees • Reduce perception gap by XX percent |

⁷⁸ Women in Mining Canada, *Welcoming Women: An Action Plan for Canada's Mining Employers*, 76.

TOOL 1.12:**Checklist for Senior Leadership to Demonstrate Commitment**

- ▶ **GOAL:** Demonstrate commitment to creating a gender-equitable work environment across the company and to shareholders
- ▶ **TARGET UNITS:** Human Resources, Senior Management, Training

Effectively supporting and developing gender diversity requires buy-in throughout an organization. Leadership at the executive level is a must for organizational change. A large-scale McKinsey study found that companies with leaders who demonstrated the behavior and commitments they were asking of their staff were five times more successful in making the change.⁷⁹ In addition, as

“Leadership support and endorsement are critical to fostering gender diversity and equality in an organization, which impacts the bottom line. Leaders have the power to influence key decisions, ensure that gender-smart policies are implemented throughout the organization, hold staff accountable, and pave the way for addressing corporate gender gaps in attracting and retaining the best talent. Leaders can also lead by example internally and externally and build partnerships.”

Source: AmCham France and BIAC, "Putting All Our Minds to Work: Harnessing the Gender Dividend."

commitment to gender diversity becomes more important to shareholders, senior managers have an important role to play in communicating to them about the ways in which the company is advancing gender equity goals.

Senior managers can demonstrate their commitment and support in a number of ways, from how they communicate their buy-in, to the incentives they develop, to the internal and external programs in which they participate. This demonstrated commitment also includes putting in place accountability systems to ensure that staff throughout the organization are held responsible for organizational change. The check-list that follows provides a range of ways in which senior managers can use their own participation to demonstrate and encourage gender diversification throughout their organizations.

SENIOR MANAGER CHECKLIST FOR DEMONSTRATING COMMITMENT TO GENDER DIVERSITY

Internal Commitment and Communication

- Communication and culture change

⁷⁹ Women in Mining Canada, *Welcoming Women: An Action Plan for Canada's Mining Employers*, 26.

BOX 1-F The Value of Mentoring

A 2006 study of Sun Microsystems by Gartner and Capital Analytics used statistical analysis to quantify the financial impact of mentoring. The study examined the progress of more than 1000 employees. Among the findings:

- **25 percent** of those who were provided with mentors had a salary grade change over a given period
- **5 percent** of those without mentors had a salary grade change over the same time period
- **28 percent** of mentors had a salary grade change compared to 5 percent in a non-mentor control group
- **72 percent** of mentorship participants were retained compared to 49 percent in a non-mentorship control group
- Mentees were promoted **five times more often** than a non-mentorship control group
- Mentors were promoted **six times more often** than non-mentor control group

Source: Knowledge @Wharton, "Workplace Loyalties Change, but the Value of Mentoring Doesn't" University of Pennsylvania, May 16, 2007.

- » In person and in writing, make a statement to all staff about the importance of gender diversity. Explain the business case and alignment with corporate priorities. The gender equity champion or gender equity task force could take the lead in this effort.
- » Explain all measures to be taken to support gender equity in the workplace. Ensure that staff understand the reasons that gender equity is a corporate priority. Be clear that the efforts are part of a plan for a stronger, more effective business model, rather than a plan to prioritize women over men.
- » Use corporate reporting materials to communicate the corporate position on gender diversity and the measures in place to all stakeholders.
- » Lead the push for organizational cultural change by taking a prominent and visible role in addressing gender diversity complaints or concerns and supporting transparency in handling all complaints.⁸⁰
- » Spearhead the development of gender equity policies and publicly encourage uptake of these policies. CEOs can take the lead in driving the development and adoption of equal-pay-for-equal-work, flexwork policies, and maternity and paternity care, for instance. Most important, managers must foster a work environment that encourages staff to access such policies without jeopardizing their advancement.

⁸⁰ European Commission Network to Promote Women in Decision-Making in Politics and the Economy, "Working Paper: How to Engage Senior Men to Promote Women to Senior Decision-Making Positions in their Organizations," 5.

- Incentives
 - » Develop and support incentive programs for gender diversity, including financial incentives for managers and departmental awards for teams that meet gender diversity and work-life balance goals.⁸¹
 - » Personally present awards and highlight winners at company-wide events to demonstrate commitment and support.
- Accountability
 - » Appoint a senior executive point person for gender diversity, for example, at the senior vice president level who is accountable to the CEO. The senior point person can be male or female, but should have time allocated specifically for this role. Too often, this is confused with simply adding these responsibilities to the duties of to the company's highest ranking female executive.
 - » Appoint a gender diversity task force that includes heads of business units and other representatives of those units. The taskforce should work with the senior executive point person to identify challenges and opportunities, develop a common, organization-wide approach to supporting gender diversity along with goals and targets, and ensure monitoring and accountability for achievement of goals and targets.⁸²
 - » Work with HR and senior management teams to set targets for increasing gender diversity in each business unit.
 - » Develop KPIs that include advancing gender diversity and establish accountability mechanisms to hold managers accountable for meeting targets.
- Leadership development
 - » Work with HR to set up women's leadership development programs, including mentorship, networking, and skills-building programs.
 - » Play an active role in these programs to demonstrate commitment.
 - » Create mentorship programs for junior staff, particularly female staff, with senior female staff where possible.

External Commitment and Communication

- International gender equality agreements and pacts
 - » Demonstrate support and commitment by affiliating with global partnerships: Among the prominent international initiatives are the Women's Empowerment Principles, EDGE

⁸¹ Australian Human Rights Commission, *Women in Male-Dominated Industries: A Toolkit of Strategies*, 52.

⁸² Calvert Group Ltd, City of San Francisco Department on the Status of Women and Verité, "Gender Equality Principles," 2008, <http://www.genderprinciples.org/assess.php?elem=115>.

gender certification, Male Champions for Change, and HeforShe. See Box 1-G for more detail on these initiatives.⁸³

- » Use tools and resources provided by these groups to meet the company's gender goals.
- International gender equality forums and events
 - » Participate in events to share knowledge and discuss progress on gender advancement. Participation in these events can present an opportunity to convey your company's gender equality commitments and actions, learn from others, and generate new ideas and partnerships for supporting gender equality. Among the more prominent events are those organized by the Clinton Global Initiative, ILO, the World Economic Forum, and the United Nations.
- Gender equity awards programs
 - » Support public relations efforts, recognize employees' efforts to promote gender equity, and enable the sharing of experiences by putting in place awards programs. Such awards also help position the company as an employer of choice for future employees. Here are a few examples of awards programs:
 - › WEP CEO Leadership Awards: The awards program of the Women's Empowerment Principles initiative recognizes concrete and innovative actions by CEOs to advance the Women's Empowerment Principles.⁸⁴
 - › Catalyst Awards: These awards recognize efforts to support the recruitment, development, and advancement of all women, including diverse women. Qualifications for the award include a thorough examination of candidates' initiatives, including an onsite evaluation, to evaluate proven, measurable results that benefit women across a range of dimensions, such as race/ethnicity, sexual orientation, gender identity, religion, generation, nationality, disability, and indigenous or aboriginal peoples.⁸⁵
 - › Business in the Community: This is the UK's most comprehensive workplace award for gender diversity. Participants receive customized feedback and recommendations to support improved performance, peer comparison, and a confidential score.⁸⁶

⁸³ It is important to note the potential issues that can arise with male advocates/champions programs. In some instances, work with male champions has inadvertently overly highlighted differences in traditional roles between men and women, and the importance of women in the community specifically because of their important domestic roles. This can have the effect of reinforcing women's reproductive and domestic roles, rather than emphasizing the importance of equitable opportunities and equal rights. Male advocate/champion programs need to be designed carefully so they do not overemphasize the difference in roles and responsibilities, but rather to focus on the benefits of equality.

⁸⁴ Learn more about the WEP CEO Leadership Awards here: <http://weprinciples.org/site/wepsleadershipawards/>.

⁸⁵ For more see: <http://www.catalyst.org/catalyst-award>.

⁸⁶ For more see: <https://www.bitc.org.uk/>.

BOX 1-G Global Gender Equality Compacts and Resources

UN Global Compact: Women's Empowerment Principles CEO Statement

The Women's Empowerment Principles are a partnership initiative of UN Women and UN Global Compact (UNGC), to help the private sector promote gender equality in the workplace, marketplace and community. As of 2017, over 1300 CEOs have signed the CEO Statement of Support, committing to employing the WEPPs to advance gender equality. For more see: UN Global Compact, "Women's Empowerment Principles."

EDGE Gender Certification

The EDGE Certification scheme is a leading gender equality certification. It helps companies demonstrate their commitment to gender equality. EDGE currently works with 170 organizations in 40 countries and 22 industries. For more see: EDGE Certification Program.

Male Champions for Change

Gender is often mistaken for a women's issue, but gender equality concerns and benefits both men and women. In male-dominated industries such as oil, gas, and mining, male participation and commitment to gender equality is essential. The Male Champions for Change (MCC) program started in Australia, but has since been replicated in various countries and contexts. The program brings together influential male leaders to redefine the role of male champions for gender equality and to create a peer group of these leaders to support the work towards gender equality. In Australia, the founding MCC group now includes 30 CEOs, board directors, governmental, university and military leaders. The Australian MCC Coalition now includes 9 different groups, and 150 leaders. For more see: Male Champions of Change.

HeForShe Champions: Male Advocates for Gender Equality

This initiative of UN Women provides a platform for men and boys to work as partners in achieving gender equality. The first HeforShe parity report was launched at the 2016 World Economic Forum, featuring key gender-related data from ten global companies whose CEOs have signed on to HeforShe's 10x10x10 program. The program is a pilot effort to engage global leaders from across government, the private sector, and academia in a commitment to advance gender equality. Participating companies included AccorHotels, Barclays, Koç Holding, McKinsey & Company, PricewaterhouseCoopers, Schneider Electric, Tupperware Brands, Twitter, Unilever, and Vodafone. The report included information on percentage of female employees, percentage of women in senior leadership roles and on the board, and the percentage of new hires who are women.

World Bank president Jim Yong Kim is a HeForShe thematic champion for international financial institutions. The World Bank Group has committed to achieving parity in senior leadership across the organization by 2020.

DeBeers Group CEO Bruce Cleaver is also a HeForShe champion. He has committed the company gender parity in senior leadership by 2020 and to investing in women micro-entrepreneurs and STEM students in Botswana, Canada, Namibia and South Africa. As part of its participation in this initiative, the company is promoting gender equality through its marketing campaigns. For more see: HeforShe.

TOOL 1.13:**Develop Human Resources Policies to Support a Gender-Diverse Workforce**

- ▶ **GOAL:** Develop policies that promote retention of employees
- ▶ **TARGET UNIT:** Human Resources

To maintain a gender-diverse workforce, you will need to identify and develop policies that can help to make your workplace more attractive to both men and women. Examples include equal pay for equal work; policies aimed at creating a supportive work environment, such as zero tolerance for sexual harassment; parental leave policies; and policies outlining appropriate physical work environment. While these may reflect long-standing corporate values, it is important to have explicit and clear rules and guidelines that are communicated to and available for all staff.

Still, clearly communicated policies are not enough to ensure that all staff at all levels of the organization can rely on certain standards and conditions for employment. Senior-level leadership and accountability is critical so that staff feel comfortable acting on the established policies without reprisal or retribution.

Here is an overview of several key gender policies. Note that this is not a comprehensive list. Rather, the examples highlighted here serve to underscore important attributes of policy options to consider.

EQUAL PAY FOR EQUAL WORK

Equal pay for equal work means that men and women will receive the same pay and same conditions for work of the same or similar job descriptions, and/or for jobs requiring similar levels of skill or qualification. Globally, across many industries, there is a pay gap between men and women performing the same jobs.

To support equal pay for equal work, salary and related compensation should be set based on the job, not by the individual performing it, and should be standardized across positions. Bonus pay should also be awarded according to a clear and transparent system, so that all staff understand the basis and metrics for bonus pay.

Ensure that Equivalent Jobs are Paid Equally

Use job evaluation metrics to determine which jobs should be paid equally. Be sure to review these metrics for hidden gender bias. For instance, two jobs that are similarly physical, such as cleaning and janitorial, might be rated differently. The stereotypically male job of janitor could be deemed

more physically intensive than stereotypically female jobs of cleaning. Use the following criteria to review job classifications to ensure that equal work is rated for equal pay:⁸⁷

- **Skill:** What training and skills are required to conduct this job?
- **Effort:** What is the physical or mental effort required to do this job?
- **Responsibility:** What responsibility does this job have over physical, financial, human, or technical resources?
- **Working conditions:** What are the physical, psychological, or other pressures associated with this job?

In addition, companies should undertake periodic gender pay gap assessments (Tool 1.9).

DEVELOPING POLICIES TO SUPPORT WORK-LIFE BALANCE

By the nature of the work, oil, gas, and mining jobs are often in remote environments, frequently requiring fly-in/fly-out or shift work. This can create a challenging environment for employees with childcare responsibilities, which is a contributing factor to the traditional male domination in OGM industries. Research commissioned by a Rio Tinto subsidiary found that “traditional work scheduling practices and a lack of family friendly work policies were the key reasons why women were not attracted to mining.”⁸⁸

Companies that want to attract and retain women—and support men’s engagement in domestic responsibilities—should consider ways to support a better balance between work and family life. Flexible work arrangements can help create more supportive and viable work options for men and women. They can increase satisfaction and productivity while also helping to attract and retain qualified candidates. In fact, at the Pilbara Mine in Australia, where Rio Tinto implemented a flexible work policy, site managers found that the new policies constituted what they called a “significant step” in attracting and retaining female employees.

Family-friendly workplace policies should apply equally to male and female employees. The goal of a gender-diverse workplace is not to prioritize either gender. Instead, the goal is to create equitable opportunities for men and women, including creating opportunities for men to take an active role in family care. Men and women should be equally encouraged and supported to take advantage of these policies. In evaluations of flexible work programs companies should be sure to look at both male and female uptake.

Companies also should take note of any legislative guidelines for flexible work. For instance, in Australia, the Fair Work Act 2009 requires companies to allow requests for flexible work arrange-

⁸⁷ ILO, *Break Gender Stereotypes: Give Talent a Chance*, 5.

⁸⁸ Rio Tinto, Rio Tinto in the US case study, 65, http://www.riotinto.com/rio-apps/riotinto_operationmap/pdf/Case_study_11_Rio_Tinto_the_US.pdf.

ments for employees with children under school age, who provide care for a family member (as per the 2010 Carer Recognition Act), who have a disability and/or dependents under the age of 18 with a disability, or who care for a family member experiencing intimate partner violence.⁸⁹

Flexible work practices can take many forms and policies can include a range of flexible work arrangements, such as:

- Flexible hours (may be based around set core business hours)
- Compressed work week
- Telework, where appropriate
- Annualized hours
- Shift-swapping
- School-term work schedules
- Flexible Fly-In/Fly-Out (FIFO) roster length:
 - » Giving employees choice of roster length
 - » Accommodating ad hoc requests for short-term roster changes for personal needs
 - » Reviewing annual FIFO rotations to ensure employees do not miss special events in consecutive years
- Leave without pay for family or parental reasons

Flexible work should be used as a business arrangement to support qualified employees and make it easier for them to juggle multiple roles. Of course, flexible work arrangements will depend on the nature of the job. For instance, telework is clearly not feasible for operational mine work; however, other arrangements could be. Employers can maintain discretion over granting of flextime, but requests should be seriously considered, because it can help improve job satisfaction and retain staff. It is of critical importance that guidelines for requesting and granting flexible work arrangements are clear and transparent, with well-defined criteria for flexible work arrangements.

In addition to using such policies to spell out provisions for granting flexible work, they can also be deployed as a way to help employees transition back to full-time work following maternity/paternity leave or sick leave.

Other programs to enable better work-life balance include parental leave for both parents, relocation support for spouses, employer-supported child care, and on-site services like banking and laundry. Amenities such as lactation rooms and breastmilk coolers can make a real difference for new mothers, and can encourage them to return to work after maternity leave.

⁸⁹ Tara Diamond, “The Rise of Flexible Work in the Resources Industry,” Carlton Victoria: AusIMM, 2016.



Encourage the Uptake of Flexible Work Policies

This involves effort on multiple fronts:

- Setting the tone at the top: Managers should lead the way and demonstrate behavior that supports the uptake of flexible work policies. They should be trained in flexible work policies, including understanding the benefits of these programs to staff and to business units, and there should be oversight across units to ensure that programs are being implemented equitably.
- Develop informational campaigns about flexible work programs, targeting both men and women.
- Review performance evaluation criteria to ensure that employees who take flexible leave arrangements are not disadvantaged for promotions—for instance, by focusing performance reviews on outcomes rather than on hours worked.

PARENTAL LEAVE POLICIES

In most countries, companies are required to provide some paid parental leave for new parents. Many of these regulations extend to mothers and fathers. Companies can support employees by reviewing parental leave policies to ensure that both men and women can take parental leave and that taking advantage of leave does not create a disadvantage for career advancement.

Parental leave policies should include:

- Length of paid leave for new mothers and fathers and length of any unpaid leave
- Notice period: Timeframe for notifying employers of intent to take leave, responsibilities in informing employers, and steps for managers to take to accommodate pregnant employees and parental leave
- Measures employers must take to find alternative job placements for pregnant/breastfeeding staff: This will depend on physical risk/health risk profile of pregnant employee's job.
- Starting point of leave: For example, at birth or prior to birth?
- Notice requirements to extend parental leave
- Protocol for communication/engagement during the leave period
- Timeline for discussing return to work
- Job coverage protocols: This includes assurances that staff can return to the same position and contingency planning when staff cannot return to the same position.
- Protocol for adoption of children and staff eligibility for parental leave⁹⁰

Employees also have a responsibility to learn about their options and rights when requesting parental leave. To ensure this, consider periodic activities and events aimed at raising awareness.

BOX 1-H Hot Seaters at the Boddington Gold Mine

At its Boddington Gold Mine in Australia, Newmont Mining Corporation is enabling increased flexibility for its staff. The Boddington Hot Seaters program trains local parents to drive heavy dump trucks so the company can replace full haulers with empty ones as quickly as possible.

These so-called "hot seaters," can work during school hours so they can be available for their children and other home responsibilities after school. The program helped the mine increase its equipment operational time by nearly 160 hours. In 2012, the Western Australia Chamber of Mines recognized the company for its innovative program. It has been featured in a YouTube ad campaign to promote Australia's mining industry.⁹¹

⁹⁰ Australian Human Rights Commission, *Tool 4: Parental Leave Checklist for Employers*, Canberra: Australian Human Rights Commission, 2015.

⁹¹ Minerals Council of Australia, "Case Study—Boddington Hot Seaters," <http://www.minerals.org.au/resources/gold/employment>.

GENDER-BASED VIOLENCE AND SEXUAL HARASSMENT POLICIES

Sexual harassment and gender-based violence can be issues in many workplaces. Given the remote location of many OGM projects and the often male-dominated workforce, however, sexual harassment and gender-based violence are particular concern for these industries. Strong sexual harassment and gender-based violence policies and training that address the behavior of employees on- and off-site are important prerequisites for establishing a corporate culture that does not tolerate sexual harassment or gender-based violence. They also contribute to a supportive and empowered environment in which men and women can work effectively together.

Given the importance of this topic, Tool Suite 4 is entirely focused on policies, activities and interventions to address sexual harassment and gender-based violence-related issues. It features draft model policies on sexual harassment and gender-based violence, an outline of the types of services that companies should consider establishing, and a draft code of conduct for on- and off-site employee behavior.

REVIEW OF EMPLOYEE BENEFITS PROGRAMS

In addition to developing policies to specifically support women's engagement and gender equality, consider conducting a review of your employee benefit programs to ensure gender sensitivity. Such a review might include:

- **Health insurance policies:** To what extent are women's health care needs (including but not limited to birth control, prenatal care and post-natal care) addressed? When family members and dependents are eligible for care, are care options equally available for men and women?
- **Pensions:** For instance, are pension plans structured in such a way that women are not at a disadvantage because they take career breaks for family obligations?
- **Employer-supported childcare and elderly care:** Are childcare and elderly care policies gender-sensitized? Do childcare policies provide equitable parental leave for male and female employees?

TOOL 1.14: Developing Women's Careers and Leadership⁹²

▶ **GOAL:** Support gender- equitable career development and mobility

▶ **TARGET UNIT:** Training

Investments in training and activities to support women's career development will help ensure that your company will be able to take advantage of the gains from a gender-diverse workforce and management team—and that you will be successful in attracting and retaining women with management potential. Such efforts are particularly important in areas where gender gaps have been identified. These actions can include:

- Ensuring that women have equitable access to leadership development programs already being offered
- Offering programs specifically targeted at developing women leaders
- Developing programs that not only help create opportunities for women, but also help women to step into leadership roles and take advantage of professional opportunities
- Creating programs that raise awareness about the challenges women face so that supervisors/managers are equipped to proactively support training programs
- Offering company-wide inclusion training to create a more positive environment for diversity

While many tools in this tool suite focus on creating opportunities and an inclusive work culture, it is equally important to develop a cadre of leadership-ready women candidates who can take advantage of a more inclusive work culture. Activities to support women leaders can be undertaken in-house or by external partners, and can draw on successful examples being piloted by other OGM companies.

OWNERSHIP OF TRAINING

For training and development to be successful there should be a clear hierarchy of ownership, in which the gender equity champion reports directly into the company's senior executive, preferably the CEO. This signals a clear commitment to the goals set out by the organization, and removes bureaucracy that may impede programing. This ownership should also extend to the board, thereby ensuring continuous buy-in from shareholders.

⁹² This tool was developed in collaboration with The Humphrey Group, a Canadian-based firm specializing in leadership communication training, which also provided the material in Box 1-I.

KEY SUPPORT STRUCTURES FOR TRAINING

In order for training and development initiatives to be successful, they require support across the company. These support structures should include:

- Board of directors
- CEO
- Executive leadership
- Gender equity champion
- Human resources department
- Participants' supervisors

SUPPORT ACTIVITIES

Complementary activities should be in place to support internal initiatives. These include:

- Consistent communication about initiatives within the company, using mechanisms such as companywide quarterly emails, annual progress reports, and town halls, among others.
- Continuous engagement/visibility in training programs, using techniques such as program kickoffs, welcome letters, conferences, and summits.

HARD AND SOFT SKILLS DEVELOPMENT

A lack of hard and soft skills often poses barriers that prevent more women from ascending to the ranks of leadership.

The mining industry is well-equipped to provide equitable hard—or technical—skills training opportunities for women. Training programs should take into account cultural norms which may mean that women have a relatively low level of baseline knowledge. They also should involve creating opportunities for women to pursue additional technical education, in either internal or external settings—and supporting them as they take advantage of such continuing education programs.

If there is a gender disparity in the ways in which employees make use of such programs, consider undertaking an assessment to understand the reasons for the disparity. Following the assessment, you can design interventions to increase women's participation, such as child care subsidies to support women's participation in continuing education. The training programs should be integrated into career planning and prioritized by supervisors. Integrating this type of training into annual objectives for women, tied to performance, is another way to ensure that hard skills development remains a priority.

Soft skills training represents an important area of development, particularly in the context of leadership competencies. It is critical to ensure that those responsible for women's development know how to support them and to ensure that women who have been identified for advancement can advocate for themselves and their abilities. Such training includes leadership training for supervisors and leaders of women and for women themselves.

Leadership Training for Supervisors and Leaders of Women

Here, the focus is on cultivating an inclusive workplace culture. To do so, supervisors must understand the challenges many women face. Supervisors also need to understand the ways in which their own leadership and communication styles impact others and whether or not staff under their supervision feel supported. Among the areas to cover in such programs:

- Unconscious bias training
- Information on cultural nuances and gender in the context of leadership
- Leadership communication training

Leadership Training for Women

To create a corporate culture in which women have a strong leadership identity, women's leadership initiatives should be multifaceted and mutually reinforcing. Program design should be based on barriers and needs identified by women within the organization. The activities proposed here focus on women already in the workforce.

As part of these efforts, consider reaching out to local communities to raise awareness about potential OGM careers and to encourage younger women into STEM sectors. Here are key features of leadership programs for women:

- **Vertical and horizontal integration:** Leadership development programs should span the entirety of an organization, from senior to junior levels and across different business units. This approach contributes to retention as well as recruitment, when new hires can have immediate access to programs. The senior-most female leaders in business units should play an active and visible role in training programs—specifically in the context of delivery. In doing so, junior women will be exposed to senior female role models. This exposure will help them develop strong leadership identities within a given corporate culture.
- **Networking opportunities:** Development programs should include opportunities for women to formally and informally network. Networking opportunities provide women with the opportunity to connect with other women who may face similar challenges and who can help them identify solutions to ongoing challenges. This could take the form of a formal organization-wide women's network, an annual women's leadership conference, or local women's chapters. Such networks should include an executive-level sponsor, country-level chapters, and yearly action plans.

- **Tiered training:** Typically, women are present at mid- and senior levels of leadership, in addition to a range of junior positions. As noted above, senior women should play an active and visible role in training; however, they too must be offered opportunities to develop their leadership competencies. Here, contracting for external training support is recommended, since professionals who specialize in leadership development can provide the greatest impact. This training should focus equally on leadership competencies for subordinates, peers, and more senior executives.
- **Mentorship and sponsorship:** Mentorships and sponsorships have proven an important element in the advancement of women in organizations. Your company's leadership development program should feature such opportunities as a component of the overall training initiative. Because mentorship serves as an important mechanism for retention, these opportunities should be made available to mid- to senior level women in particular, since this is where attrition rates are typically the highest. Senior mentors should have accountability for progress of mentees, according to an agreed set of criteria.⁹³ While these programs can be developed between senior and more junior women, also think about mentorship and sponsorship programs that work across gender, to ensure that young men and women have equitable support in their career growth. Examples of successful programs include PepsiCo's Power Pairs, which teams up senior leaders with more junior women of color to increase racial and gender diversity in the leadership development pipeline.
- **Leadership opportunities:** Development programs also should include opportunities for high-potential women to showcase their skills and abilities to the executive leadership. Visibility is a critical component of career advancement. Many women, in particular, have little exposure to the upper echelons of leadership, particularly mid-level female employees. Opportunities such as presentations to senior leaders heighten promising women's visibility, while providing valuable experiences that build confidence.

AREAS OF TRAINING FOCUS

Leadership training programs should cover a range of topics and subject matter. Among the key areas are communications and career management.

Effective Communication Skills

Strong communication skills are a fundamental leadership competency. To navigate corporate culture, women must have the tools to advocate for themselves and their ideas in a manner that resonates with those in power. Cultural norms—and the resulting socialization—often discourage

⁹³ This section draws on Women in Mining Canada, *Welcoming to Women: An Action Plan for Canada's Mining Employers*.

women from doing so, either in the home or in the workplace. Leadership communication training gives women the tools to influence at all levels of an organization, from delivering presentations to chairing meetings. By developing effective communication skills, women are perceived as leaders. This training should include:

- An understanding of optimal ways to address diverse and often male-dominated audiences in an influential manner
- Tools to speak and write in an effective and organized fashion: For instance, how to avoid habits that position women as subordinates
- Vocal training that encourages women to speak more effectively when surrounded by men
- Tools to help eliminate minimizing behaviors that reinforce traditional dynamics of power: For instance, confident body language, conversational eye contact, measured pace, and confident expression

By encouraging the application of these skills on a daily basis, the training can help reinforce positive leadership perceptions, which are critical to women's advancement through the career ranks.

Companies such as Goldcorp have seen positive results from such training. The Creating Choices program, developed by Goldcorp women for Goldcorp women, aims to build self-confidence and leadership skills. It has helped women take advantage of professional opportunities available in the company. See Box 1-I for more on this program.

Career Management

Career management is an important area of leadership development. Women should have access to formal training on this issue. Career management is often supported by the human resources department, however, supervisors also should play an active role in helping women build their short- and long-term career plans, as well as strategies that balance work goals and personal responsibilities. This training also might include ways to communicate career goals to senior leaders. In addition to comprehensive career planning, women should have opportunities for out-of-office experiences, such as job shadowing.

Because women consistently cite tension between work and personal responsibilities as a barrier to advancement, the issue of work-life balance should be included in career management planning. Training in this area should include guidance on ways to navigate responsibilities and communicate effectively about personal and professional needs.



BOX 1-I Partnership with Humphrey Group Helps Goldcorp Build its Female Talent Pipeline

Launched in 2011 for Goldcorp's Latin American operations, Creating Choices is an in-house training, development, and mentoring program for women. A unique collaboration between the company and The Humphrey Group, a Canada-based consultancy specializing in leadership communication training, the program was piloted with a small number of women, who provided comprehensive feedback on program design and delivery before company rollout. Following the pilot, the program was delivered by women at Goldcorp who were trained by The Humphrey Group experts. In doing so, the trainers assumed a leadership role in developing other women and serving as role models. Because these in-house facilitators have inside knowledge of the challenges the participants face and a deep understanding of the company's unique corporate culture, they were well-positioned to customize examples and feedback, enabling more effective training that has helped women at Goldcorp succeed.

Concern about lack of female advancement a catalyst for change

In such a male-dominated industry, Goldcorp recognized that the progress of women was often inhibited not merely by a lack of roles, but by a lack of confidence in speaking up, sharing opinions, and making decisions—as well as the limited number of women with the requisite leadership skills. Company leaders realized that empowering women and achieving the associated business was merely a matter of creating more opportunities for women. Instead, it would require a sustained effort to train and support female employees so they could prepare to step into those roles.

Goldcorp realized it needed assistance from experts. The company brought in The Humphrey Group, a longstanding champion of diversity and inclusion. Its Taking the Stage program has been delivered to over 500,000 women around the world and formed the basis for Goldcorp's Creating Choices program.

The Creating Choices program includes six modules: Building self-esteem; Daring to Dream; Choosing to take the Stage; Unlocking the Power of your Voice; Creating a Leader's Script; and Achieving the Presence of a Leader.

It addresses the unique challenges for women in the mining industry and helps Goldcorp's female employees develop the skills to advance and contribute to company success.

Course materials for the train-the-trainer program include participant guides, a facilitator guide, and videos to support the learning for the modules. The guides also feature exercises for each module to allow participants to practice and receive individual feedback from the facilitator and their peers.

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Second program builds on initial success

Building on the success of Creating Choices, Goldcorp again partnered with The Humphrey Group to design a second program offered to graduates called Growing Choices, in which participants learn to apply the skills developed in Creating Choices to successfully navigate corporate structures. During the course, they learn to brand themselves as leaders and plan and realize career advancement.

These programs are complemented by a comprehensive mentoring program, which includes male and female mentors, in addition to a women's conference to celebrate the company's gender diversity accomplishments. Creating Choices and Growing Choices are open to women at any level of the organization, including interns. Both are offered on the worksite, in local languages.

Company-wide roll-out reaches 1,700 female employees

Initially aimed at female employees of Goldcorp's Latin American operations, Creating Choices has since been rolled out across the company, reaching more than 1700 women to date.

The positive impact has been significant. In a 2014 impact assessment female participants reported increased confidence, and greater willingness to express opinions. They also said they felt more supported in the pursuit of professional and personal goals. Of note, supervisors reported tangible upticks in participants' leadership skills and confidence, resulting in better work quality and productivity. Among the specific improvements noted by supervisors: enhanced communication among peers, greater confidence and independence in expressing opinions and making decisions, and heightened focus on career advancement at the company. Participants also were more likely to set personal and professional goals, such as pursuing advanced degrees and training. A follow up assessment in 2017 revealed similar findings.

For more information, see: GoldCorp's 2016 Sustainability Report, <http://csr.goldcorp.com/2016/our-people/diversity-and-inclusion>

TOOL 1.15: Monitoring, Evaluation, and Reporting

▶ **GOAL:** Track and support gender-diversity progress

▶ **TARGET UNIT:** Training

Developing strategies for monitoring indicators, rewarding growth, and promoting sustained progress will help ensure that you can effectively track your gender diversity gains and continue to improve.

MONITORING

The first step for any monitoring strategy is to ensure that SMART (specific, measurable, agreed-upon/accountable, realistic, and time-based) targets are in place. Everyone in the company should be aware of the targets, and understand their role in helping to meet them, as well as accountabilities and responsibilities.

Next, companies need to determine the monitoring approach and frequency. How will progress towards targets be reviewed? How often? What measurement instruments will be used? Many of these instruments can be used multiple times, from the initial assessment to subsequent monitoring and evaluation. Here is a suggested monitoring schedule:

Quarterly Monitoring

Recurring data collection should include:

- Recruitment: Gender ratios of job applicants, shortlists, new hires
- Promotion: Gender ratios on promotions for positions with qualified male and female applicants
- Gender ratio in requests for telework and status of telework requests
- Percentage of women at each staff level, and in each job description

Yearly Monitoring

This annual exercise should include:

- Abridged gender audit: Include a selection of questions from the initial gender audit based on corporate priorities, as well as a review of the physical environment.
- Follow-up pay gap study: Use same metrics as in original and evaluate change
- Review recruitment materials and advertisements and review targets for women's representation on recruitment shortlists

- Review performance reviews: Track changes in KPIs on gender
- Track number, frequency, and attendance for gender-related training activities
- Track reports of sexual harassment, and use of ombuds services
- Review uptake of flexible work arrangements by gender
- Review uptake of mentorship and professional development programs by gender
- Conduct additional monitoring to comply with the Global Reporting Initiative

Biennial Monitoring

- Repeat full gender audit

After determining your monitoring approach and setting a schedule, the next step is to decide on reporting responsibilities for each of the metrics. Assign appropriate units, designate specific measuring instruments to use, stipulate presentation format for results and set a timeline for completion. Led by the gender champion, the gender equity task force should take charge of gathering all results.

After pulling together all the information, the gender equity task force should review and analyze data to identify ways to improve and sustain positive results. The task force might be able to handle this task on its own, or the group may decide to bring on an expert consultant to assist.

For all of the metrics examined above, review accountability: are responsible team leaders aware of and trained on the progress they are trying to achieve? What kinds of specific accountability mechanisms are in place? For example, are results discussed during performance evaluations? Are results linked to bonuses?

In addition, the monitoring process should include a look at whether incentives are in place for teams and their managers to support continued investment in progress and a sense of shared benefit and accomplishment.

TOOL 1.16:**Monitor and Sustain Training Programs for Gender-Equitable Career Development⁹⁴**

- ▶ **GOAL:** Monitor and support training programs
- ▶ **TARGET UNIT:** Training

To ensure the success of training programs, monitoring and sustainment of learning is essential. Regardless of the type of training (hard or soft skills), deliverables should be measured against gender diversity goals set out by the organization.

MONITOR

To ensure the effectiveness of training programs, companies should focus their monitoring efforts in three ways, as follows:

- **Corporate-wide monitoring:** Qualitative and quantitative monitoring should take place throughout the duration of training. Training deliverables should be integrated into corporate KPIs. In some cases, this may mean redesigning KPIs or adding new KPIs to existing structures. By integrating these training deliverables into formal performance indicators, the monitoring process is made easier. Such monitoring systems make it easier to measure progress on gender goals, such as the number of females promoted to senior leadership within the year.
- **Informal, case-by-case monitoring of participant development:** Managers/supervisors of training participants should provide qualitative feedback on development, both formally and informally. At a minimum, managers should provide feedback on retention and application of training deliverables as they conduct performance reviews. This feedback will support the monitoring data captured by the human resources department. In addition, it holds managers more accountable for ensuring learning retention and application.
- **Program monitoring:** Continuous monitoring of the training programs themselves is important. This ensures that the training offered continues to meet the needs of participants—needs that can change over time. Comprehensive program feedback forms and monitoring of delivery systems enable better control over content and help identify the kinds of changes necessary to ensure continued relevance of learning modules.

⁹⁴ The Humphrey Group developed this tool.

SUSTAIN

Maintaining, internalizing, and building on skills learned is an essential investment in training. The easiest way to ensure skills sustainability is to create multiple and mutually reinforcing touchpoints.

- **Managers/supervisors:** They must play a central role in reinforcing new learning. This means having an understanding of program content so they can support participants as learned skills are applied. Inclusivity leadership training helps sustain the gains from soft skills training.
- **Reinforcement systems:** Formal mentorship/sponsorship programs help reinforce the learning and contribute to sustaining gains. They give participants the opportunity to test out and review the skills learned. Such programs also provide valuable exposure to senior decision makers who could advocate on behalf of their mentees in the future.
- **Continuing networking opportunities at local, regional, and global levels:** This allows ongoing interaction among participants long after the training has ended. Such opportunities are particularly important for both hard and soft skills development, because they enable the sharing of best practices, lessons learned, and feedback. Summits for high-potential leaders provide similar opportunities to continue conversations around learning while acknowledging the accomplishments of successful women.
- **Community engagement:** Tension between personal and professional spheres can sometimes create barriers to women's advancement. Engaging the community through education in the types of programs being offered can reduce this tension. Emphasis here should be on hard skills training that falls outside traditional roles for women, leadership skills, and communication training. Engaging with the community on these themes can help ensure the appropriate framing, given the local context.
- **External feedback:** Engaging with the community helps create a feedback loop into the organization. In this way, community engagement is clearly linked to the bottom line, demonstrating the business case for investment. Companies can offer soft skills workshops on topics such as inclusivity, leadership, and communication training to local schools as a part of their community investment initiatives. In doing so, they empower potential employees with the skills needed to be successful if they are hired in the future.

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