

Gender Strategy Toolkit

A framework for achieving gender equality in your organisation

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DRAFT FOR CONSULTATION

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Introduction

The gender equality journey

Gender equality in the workplace is achieved when people are able to access and enjoy the same rewards, resources and opportunities regardless of whether they are a woman or a man. Our goal in providing this toolkit is to equip organisations with the skills and resources to accelerate strategic, meaningful and sustainable change.

Addressing gender equality within organisations will not happen accidentally, and like any other business issue, a strategic and systematic approach is required. The process of achieving gender equality is often referred to as a 'journey'. This is because the end-state or 'destination' (i.e. a workplace which is genuinely and sustainably equitable to both women and men) can only be achieved over time, and through a series of stages, which are cumulative in their impact.

A key starting point for many organisations is through annual reporting to the Workplace Gender Equality Agency (WGEA). The *Workplace Gender Equality Act 2012* requires all non-public sector employers with 100 or more employees report to the Agency in a standardised format on gender outcomes, including in areas such as workforce composition, pay and flexible work. In return, the WGEA will provide feedback to each of these employers in the form of a confidential, customised benchmark report on their gender performance.

This benchmark report will provide a powerful business intelligence tool, enabling employers to compare their gender performance to their peers, identify areas for improvement and track the effectiveness of their gender equality strategies over time.

This data is unique. No similar benchmarking data is available to employers in Australia. It will provide employers with the evidence base to pinpoint their efforts to improve gender equality in their workplaces.

Aims of the toolkit

This Toolkit has been developed to help organisations leverage the value of the benchmark data in a strategic, structured and sustainable way. The toolkit also provides guidance for those organisations aiming to become an Employer of Choice for Gender Equality¹ or adopt best practice.

→ Identify the on-ramp points to the gender equality journey

The toolkit assists organisations who are starting on the gender equality journey and those already on the journey wanting to make faster and more effective progress – by making better decisions which result in appropriate, well-targeted actions, and doing this systematically (i.e. in a sequence which delivers desired outcomes as efficiently as possible). Central to this is the design and implementation of a gender strategy.

→ Provides the 'how'

A well-constructed gender strategy provides the fundamental framework by which organisations can navigate and accelerate their own unique gender equality journey. In the following sections of this Toolkit, we explain *how* to build an effective gender strategy, and *how* to use this to generate momentum and sustainable progress. In section 3, we highlight specific opportunities to maximise progress (which we refer to as 'on-ramps' and 'express lanes').

→ Showcase best practice

The Toolkit contains advice on leading practices, which reflect both contemporary research and ongoing learning from workplace application of concepts by organisations which started their journey some time ago. Employers that are just recognising the need to start their gender equality journey can benefit significantly from this learning.

¹ A strategic approach to gender equality is a prerequisite for EOCGE citation (criterion 1) and an essential underpinning for meeting other criteria.

Who is this toolkit for?

Any individual who is a stakeholder in workplace gender equality, and who has the potential to influence an organisation's approach to gender issues should find some or all of the thinking frameworks and ideas useful. Such stakeholders are likely to include business leaders and managers, diversity champions and sponsors within organisations, and/or human resources and diversity practitioners.

From an organisational perspective, we recognise that gender equality start points and levels of readiness and maturity will differ, and have therefore attempted to accommodate the resulting range of needs. We envisage several different scenarios in which the Toolkit will be relevant; in particular:

- Organisations that have recently started (or are about to start) their gender equality journey. Often the hardest question is “where do we start?” and “what does progress look like?” The Toolkit helps to answer these questions and provides a structured approach for prioritising effort and investment.
- Organisations that have already started their gender equality journey. Their question may be “how can we make faster progress?” or “how can we achieve more impact from our effort?” Here, the Toolkit can be used more selectively, to identify and help fill gaps in approaches (especially those that lack strategic direction) and enable stakeholders to avoid pitfalls and wasted effort from well-intentioned but poorly-targeted initiatives and investment (e.g. which address symptoms rather than root causes).

Why is a gender equality strategy important?

Most organisations develop strategies. A strategy defines a range of objectives in a particular area of endeavour and the underlying business rationale. Typically, it will also indicate (at a high level) how these objectives will be realised, together with an assessment of risks and success factors. Specific project plans for discrete initiatives provide the detail of how the strategy is executed. Without the clarity of direction provided by a strategy, it is either difficult or impossible to gauge whether day-to-day activity and investment (both human and financial) are helping the organisation progress towards the desired end-goal as effectively as possible.

Achievement of gender equality outcomes is no different. The underlying assumption of this Toolkit is that when organisations use it to become more strategic in their approach to gender equality, the resulting strategy will link to and support broader business strategies and objectives.

Advantages of a strategic approach

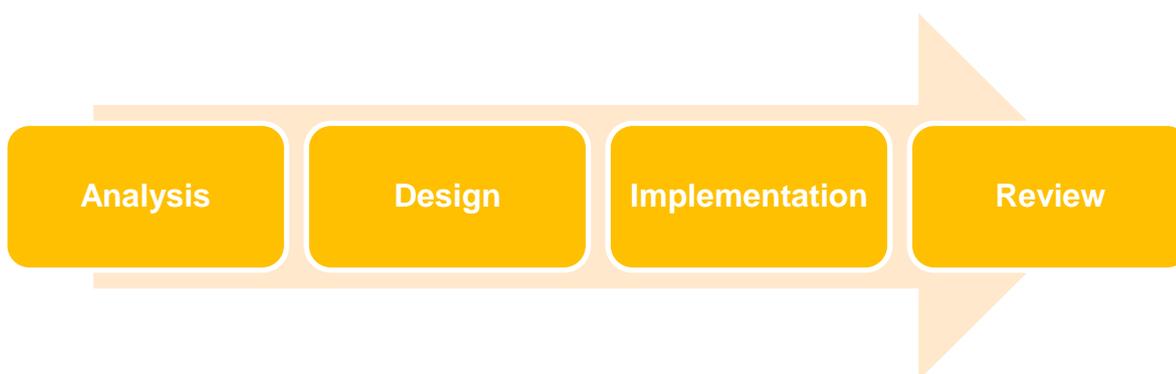
- Concerted action: all parts of the organisation are working and moving in a similar, consistent direction (rather than different ones or even competing against each other).
- Well-targeted investment: every program or initiative can be tested before proceeding: will it help achieve the strategic objectives that have been agreed?
- Synergies: organisations can avoid ‘re-inventing the wheel’ by adopting similar approaches which are mutually supportive and which enable avoidance of mistakes and wasted effort.
- Economies of scale: sharing information and resources across the organisation and using collective commercial power (e.g. use of external vendors / service providers) to increase cost-effectiveness
- Consistency of approach: when different business units or teams approach gender equality similarly, employees' experience of the workplace is consistent and predictable, wherever they are deployed internally; this fosters engagement and productivity.
- Mobilisation and motivation: a strategy provides a basis for communicating intent, engaging stakeholders around specific objectives and building long-term support.
- A basis for measuring success: clarity of direction and purpose provides a robust basis for measuring progress and success, including return on investment.
- Reporting requirements: adopting a more strategic approach to gender equality will assist organisations to meet their reporting WGEA obligations, e.g. in relation to Gender Equality Indicator (GEI) 1, which contains questions in relation to strategy. Adopting a strategic approach will enable employers to answer ‘yes’ to questions where they previously responded ‘no’, and thus help them improve their performance against reporting matters.

The change process

The gender equality journey involves a process of change: the end-point is different from the start. There is a significant body of learning from organisations that have, for a range of reasons, needed to change the way they operate or conduct their business. As a result, there are many different models and proprietary tools for managing organisational change.

The goal of this Toolkit is not to replicate any of these. Instead, it aims to provide a simple, strategic framework for identifying and taking action in relation to gender equality which is consistent with generic change management approaches or which can be easily integrated into a specific change methodology already used by an organisation. It aims to reflect established core change management principles.

To achieve this, the Toolkit (and suggested actions within it) is structured around 4 stages which typically guide change programs (and discrete workstreams within these). These stages are summarised below, and are explained in more detail in the Toolkit sections which follow.



- 1. Analysis**
 - Where are we now?
 - Where do we want to be (and why)?
- 2. Design**
 - What is the best route to get there?
- 3. Implementation**
 - How can we start (or keep) moving?
- 4. Review**
 - How are we travelling?
 - And
 - “Who else might benefit from our learning?”

Navigating the Toolkit

The Toolkit structure is intended to be logical and intuitive. Before defining and describing the gender equality journey, it explained the benefits that are on offer from making that journey – i.e. the business case. Most journeys have a purpose – either because the experience itself is rewarding in some way, or because the destination offers something beneficial – in this case the improvements in performance (organisational and individual) and workplace culture arising from gender equality. If you expect someone to go somewhere new or different – and to expend time and effort doing so – they will probably, and quite reasonably, wish to know why.

After explaining the gender equality journey, the Toolkit describes the essential building blocks of an effective gender equality strategy. We then put these elements together to create a scorecard – a means by which organisations can assess their current gender equality status and performance, and then identify the gaps and weaknesses in their approach. This insight then provides the basis for taking action to improve these shortfalls – including appropriate sequencing and prioritisation.

Linkages to other requirements and resources

The Toolkit also provides a robust and consistent means by which organisations can evaluate their current and future gender equality achievements, as well as their progress over time. It is one of two new resources previously unavailable to organisations. These are:

- Gender Equality Benchmarks: an assessment relative to a chosen comparison group (e.g. industry competitors)
- Gender Equality Scorecard: an assessment against consistent and robust best practice standards.

Together, these different and complementary 'lines of sight' offer powerful and unrivalled understanding of what needs to be done or done better.

In addition, this Toolkit is intended to be the central hub of WGEA touch-points and resources for organisations.

Below we have listed, and provided links to, the requirements that the WGEA sets for organisations, and the resources it has developed to help employers meet these. The Toolkit is the core framework which connects these together.

Requirements

- Compliance reporting: <https://www.wgea.gov.au/report>
- GEIs: <https://www.wgea.gov.au/lead/improve-against-gender-equality-indicators>
- Minimum standards: <https://www.wgea.gov.au/report/about-reporting>
- EOCGE: <https://www.wgea.gov.au/lead/employer-choice-gender-equality>

Supporting Resources

- Business case: <https://www.wgea.gov.au/learn/about-workplace-gender-equality>
- Reporting: <https://www.wgea.gov.au/research-and-resources/reporting-resources>
- Benchmarks / Insights: <https://www.wgea.gov.au/lead/benchmarks>
- Gender Pay Equity Toolkit: <https://www.wgea.gov.au/learn/about-pay-equity>
- Target-setting Toolkit: <https://www.wgea.gov.au/learn/about-setting-gender-targets>
- Procurement Principles: <https://www.wgea.gov.au/about-wgea/workplace-gender-equality-procurement-principles>
- Data (factsheets and statistics): <https://www.wgea.gov.au/research-and-resources/fact-sheets-and-statistics>
- Employee Opinion Survey (Culture / Engagement / Consultation): <https://www.wgea.gov.au/lead/employee-opinion-survey>
- PPL: <https://www.wgea.gov.au/research-and-resources/gender-equality-tools>

Section 1: The business case for gender equality

A business case for gender equality is an essential prerequisite for building commitment to a gender strategy and its implementation. Whilst this is particularly so in commercial organisations, the principle is equally valid in a public or third sector context – even if the language and terminology used many need to be adapted.

Too frequently, there is insufficient focus given to the development, endorsement and socialisation of a robust and credible business case for gender equality. Weakness at this stage of the strategy development process has the potential to undermine the success of everything that follows – because a business case is usually critical to stakeholder support. Reliance on a sense of corporate responsibility or supportive individual attitudes and values is neither best practice nor a sound approach.

The learning from organisational experience indicates that approaches to the gender equality business case often suffer from a number of the following limitations:

- reliance on a generic business case instead of developing a specific one, unique to the organisation
- no gathering or utilisation of relevant and compelling data (quantitative and qualitative) to substantiate the business case
- the specific business case is not cascaded or redefined for sub-units or teams within the organisation
- key stakeholder understanding is limited to only parts of the business case
- key stakeholders have an intellectual appreciation of the business case but lack belief or conviction in its validity
- the business case is not actively communicated or promoted across the organisation
- no attempt is made to measure impact or return investment arising from gender equality action in order to retrospectively demonstrate the legitimacy of the business case (and this build future support).

A simple but effective remedy to these issues is to use the generic business case as a basis for identifying which components resonate most strongly for key stakeholders. Note that their views may differ according to their role and situation in the organisation. When the most relevant components have been isolated, this should be followed by data-gathering, analysis and reporting in order to validate (or discount) stakeholder feedback.

When the explicit, data-backed business case has been defined and endorsed by senior leaders, it should then be communicated across the breadth and depth of the organisation, preferably within broader business messaging, and alongside the gender strategy. It should be made accessible to employees at all levels using whatever combination of media is necessary. The level of detail appropriate for different stakeholder groups may vary.

In table 1 below, we have set out the generic gender equality business case in a number of ways. This can be used as the start point for developing a specific organisational business case.

Table 1 key stakeholders & benefits

Stakeholder	Benefits
Customers	<ul style="list-style-type: none"> → A workforce which is as diverse as its customers can more effectively: <ul style="list-style-type: none"> • understand and anticipate customer needs – which enables proactive tailoring of customer solutions, services, advice and information; • personalise communications and interactions, develop deeper connections, and engage more meaningfully with customers.
Market Share	<ul style="list-style-type: none"> → Attracting and retaining new business in target market segments can be influenced by perceptions in relation to factors such as ethical conduct, corporate responsibility and citizenship, and commitment to equality and diversity.
Talent	<ul style="list-style-type: none"> → Talent and capability is not found in one particular demographic; to ensure an organisation has access to the best available talent and is able to retain this, it will need to progressively become an employer of choice for existing and potential employees → Rapidly changing workforce demographics (a shrinking, ageing and more female workforce) mean that organisations will increasingly be challenged in the search for talent, unless they are able to draw from and retain candidates from diverse backgrounds.
Performance	<ul style="list-style-type: none"> → Research and organisational experience indicate that diverse teams consistently outperform homogeneous teams and produce stronger (business) outcomes – provided an inclusive culture operates, where all ideas or contributions are valued and considered → Employees at all levels who are valued and included, irrespective (or because) of their individual differences, and who can ‘be themselves’ at work are typically more engaged, motivated and therefore productive → Co-workers who understand and respect individual differences collaborate more effectively and with less conflict.
Innovation	<ul style="list-style-type: none"> → Developing innovative solutions to customer needs, creative exploitation of technology and continuous process improvement may help sustain competitive advantage → Diverse and inclusive teams are more innovative because they have a wider set of experiences, approaches and resources to draw upon → Enabling people to constructively challenge established approaches and conventional thinking provides the basis for experimentation and managed risk-taking.
Agility	<ul style="list-style-type: none"> → Flexible teams are typically more adaptive and responsive to rapid changes in business conditions and priorities because they already communicate, collaborate and deliver results in ways which are far less restricted by time and location, and which exploit technology to full advantage.
Risk	<ul style="list-style-type: none"> → Diverse teams which operate inclusively can manage and mitigate risk more effectively by avoiding sub-optimal decision-making associated with ‘group-think’.
Community	<ul style="list-style-type: none"> → Communities and their individual constituents are increasingly influential (and may also be customers); a workforce which represents and is connected to local communities and their values is better able to anticipate and meet their expectations; this can help foster a positive disposition towards an organisation when business outcomes have community impact.
Other Stakeholders	<ul style="list-style-type: none"> → Diversity (particularly gender diversity at leadership levels) is subject to increased scrutiny and strengthened legislation. The effect will include greater exposure of the gender diversity of talent pipelines to leadership levels → An organisation’s reputation and brand will continue to be relevant in relation to government, regulators, shareholders, investors, analysts, contractors, suppliers and partners; progress in diversity and inclusion can help an organisation position itself as a business which is well-managed (including in relation to risk), and authentically ‘lives’ its culture and values.

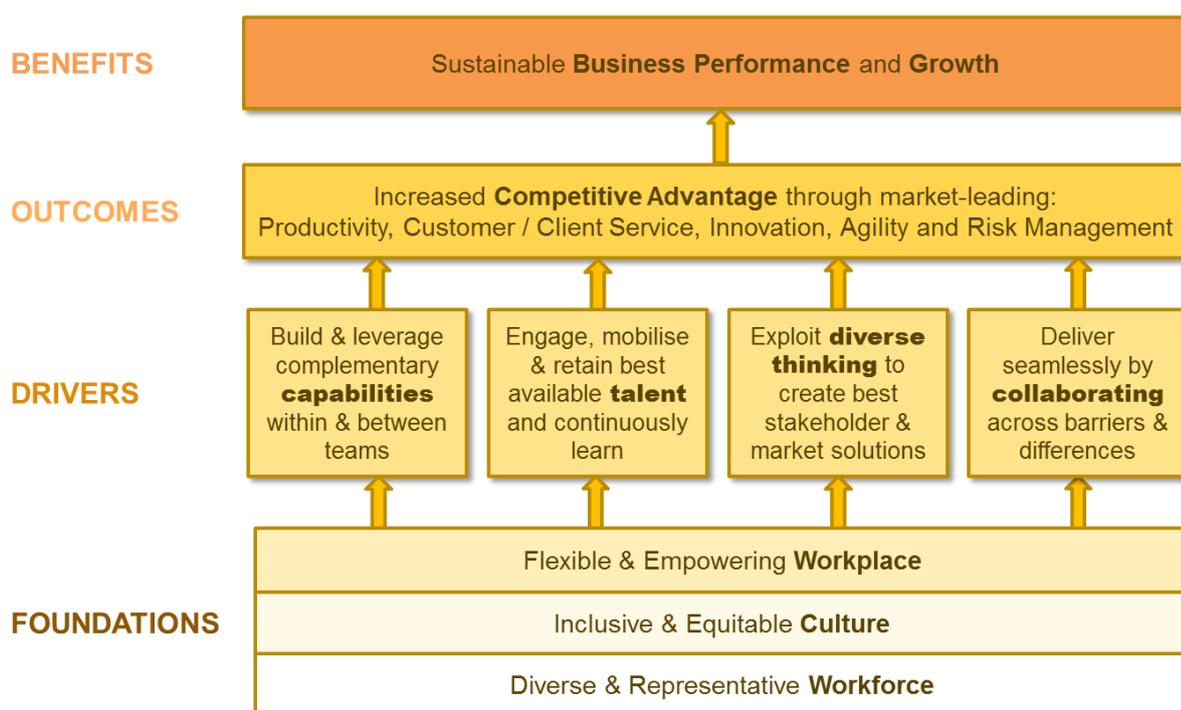
How gender equality supports business performance

The WGEA describes a gender-equitable workplace as one in which women and men are equally represented, valued and rewarded. Leading organisations in gender equality terms have recognised that building and maintaining gender diverse teams and an overall workforce is essential but not sufficient.

In order to fully capitalise on the benefits that gender diversity brings to organisations of all kinds, employers must also develop and foster a culture which is consistently inclusive to both women and men. Flexible mindsets and work practices represent key enablers of gender equality, diversity and inclusion.

We have developed the diagram below to illustrate how these foundational elements support business performance² and create long-term competitive advantage. The return on investment (ROI) from achieving genuine workplace gender equality is derived from sustainable performance improvements, not short-term, transient gains which may be subsequently lost.

Figure 1 the business case for gender equality



Foundations

- **Diverse & Representative Workforce** – a gender-diverse workforce (at all organisational levels, particularly leadership) is an essential foundation for maximising team and business performance – but it is not sufficient without the two additional components of inclusion and flexibility. Organisations will need to determine the appropriate benchmark against which to determine whether gender diversity is appropriately representative (the overall population, national workforce, local community, client or customer base etc.).
- **Inclusive & Equitable Culture** – gender inclusive and equitable workplace culture provides the basis for fully utilising the different and complementary strengths that men and women bring to their work and to teams. Inclusion involves empowering everyone to make a relevant contribution – e.g. listening to the ‘quietest voice in the room’, and valuing and considering everyone’s ideas equally. This promotes diversity of thinking, in which assumptions and the status quo can be constrictively challenged in pursuit

² Note that terms such as business performance can equally apply to public sector or non-profit organisations. Organisational (non-commercial) performance is a relevant and equally valid measure of impact generated by gender equality action.

of the best solution. Inclusive cultures require inclusive leadership behaviours, e.g. where decisions are not made within exclusively male networks.

- **Flexible & Empowering Workplace** – flexible work practices enable the attraction, retention and optimal utilisation of gender diverse talent. Also, research indicates a strong correlation between flexible work and a sense of inclusion and engagement (because employees have had their unique, individual needs understood and accommodated). Structured appropriately, flexibility has the potential to strengthen individual and team performance (e.g. through discretionary effort) as well as customer relationships and responsiveness. Flexible teams are typically more agile and adaptable, because their work methods are less constrained by time and/or location.

Drivers

- **Build & leverage complementary capabilities within & between teams** – women and men bring different strengths and capabilities, although not all these are necessarily ‘hard-wired’ by gender, according to recent research. Either way, to develop the best solutions and deliver the best results, everyone has to be open to alternative ways of thinking (e.g. problem-solving, assessing risk etc.), different work styles and preferences (e.g. introvert and extrovert) and leadership styles.
- **Engage, mobilise & retain best available talent and continuously learn** – the most engaged and productive employees are those who are:
 - empowered to realise their full potential
 - enabled to maximise their contribution to the organisation and team,
 - are fairly recognised and rewarded for this
 - are encouraged to be themselves at work

Anticipating and embracing different ways of working also provides a valuable opportunity for continuous learning (from each other) and improvement.

- **Exploit diverse thinking to create best customer & market solutions** – most employees have customers of some kind, whether internally or externally. When the composition of teams reflects the gender (and other) diversity of their customers and clients, they are better able to:
 - Develop deeper and more meaningful connections and longer term relationships
 - Understand customers’ perspectives and use this to better anticipate and exceed their needs and expectations
 - Proactively tailor customer communications, advice, insights and information

Research and organisational experience demonstrate that gender diverse and inclusive teams are consistently more innovative than homogeneous teams, and they avoid the risks associated with ‘group-think’ (i.e. sub-optimal solutions).

- **Deliver seamlessly by collaborating across barriers & differences** – anticipating and embracing different ways of working (amongst co-workers, customers, and other stakeholders) reduces the potential for interpersonal conflict, and more constructive business and organisational outcomes (see below).

Outcomes

At a high level, organisational and leadership commitment to gender equality (including gender diversity, inclusion and flexibility) have the potential to increase business performance (including revenue growth, cost management and profitability), and competitive advantage. This is achieved through the combination of enhancements in productivity, customer or client service, innovation, agility and risk management, as explained above.

Benefits

The return on investment in gender equality may not necessarily be immediately evident at an organisational level (although benefits to employees, customers etc. may be more visible). For the reasons set out above, gender equality supports the long-term health and viability of an organisation.

Fully unlocking the value from a gender equitable workplace requires culture change as well as process improvement. Influencing individual attitudes and values is not always easy and takes time. However, the prize on offer is an organisation and/or business which is more sustainable, i.e. is better equipped for the future, irrespective of a constantly evolving external environment and an accelerating rate of change.

Below are some examples of success indicators for each of the foundations and drivers in the business case.

Table 2 example success indicators

Business Case Component	Success Indicator
Diverse & Representative Workforce	Improvement in gender balance of overall workforce and sub-groups (e.g. by level, business unit, job family) compared to comparator population (e.g. workforce, community, customer base)
Inclusive & Equitable Culture	Increase in positive responses to benchmark question in employee engagement survey about gender inclusivity of organisation
Flexible & Empowering Workplace	Increase in utilisation of formal flexibility options by men and women; increase in positive responses to benchmark flexibility question in employee engagement survey
Complementary Capabilities in Teams	All required / desired capabilities are collectively demonstrated in aggregated performance assessments of team members
Talent Engagement, Mobilisation & Retention	Sustainably improved gender balance of talent pipeline, development program participants, international / special assignments, retained talent
Diversity of Thinking	Qualitative feedback of team leaders and members in relation to increased innovation of solutions
Seamless Collaboration across Boundaries	Qualitative feedback of team leaders and members in relation to improved collaboration and / or reduced conflict across relevant boundaries

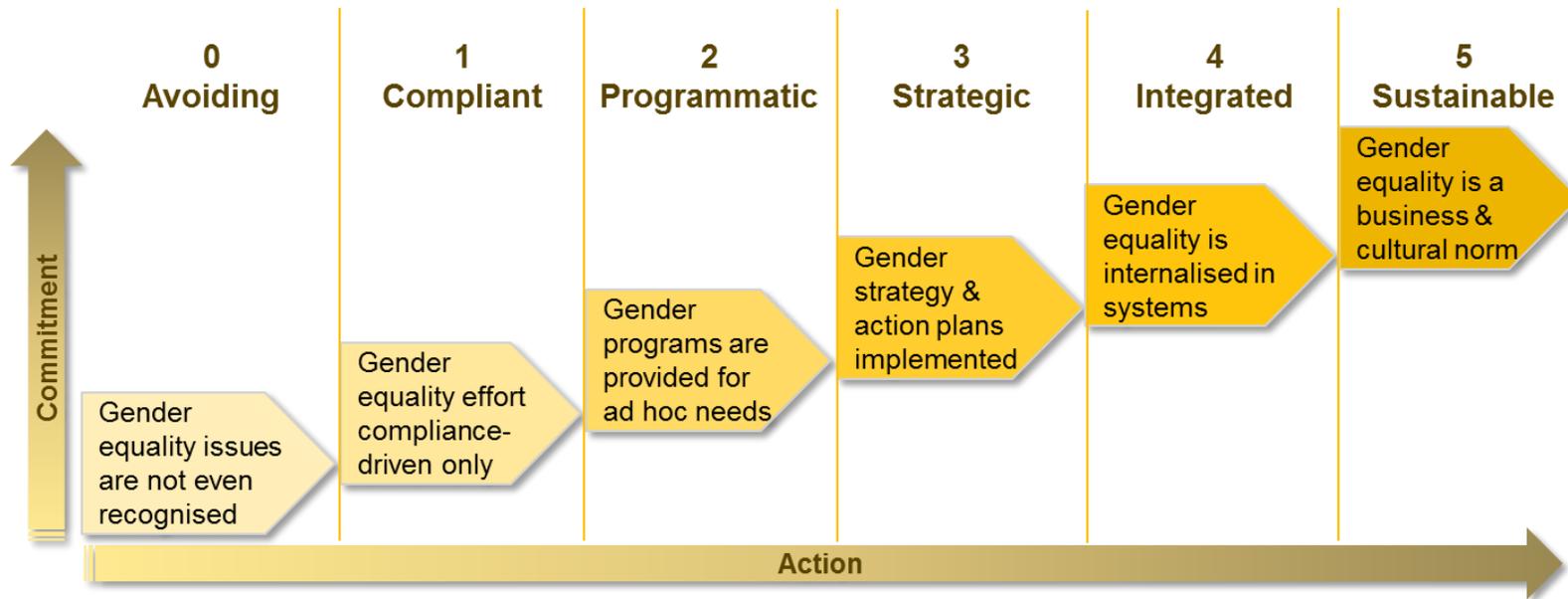
Section 2: The Gender Equality Roadmap

This tool is designed to help organisations understand the nature of the gender equality 'journey' and the identifiable phases within it. The roadmap enables you to plot where you have reached on your journey; organisations can then identify what progress looks like and plan accordingly.

The phases of the journey may not be quite as discrete or well-delineated as shown on the model; some phases may last longer than others. Nonetheless they reflect the real experience of leading organisations in equality and diversity.

Organisations less advanced in gender equality can exploit this learning to increase momentum and accelerate progress (which we refer to later as using 'on-ramps' and 'express lanes').

The Gender Equality Roadmap³



³ [*Adapted from the Diversity and Inclusion Pathway© model developed by Diversity Partners Pty Ltd (www.diversitypartners.com.au) and shared with their kind permission].

Table 3 Typical characteristics for each stage of the road map

Phase	Characteristics
Phase 0: Avoiding	<ul style="list-style-type: none"> → structural and cultural barriers to female career progression are unrecognised or denied → exclusive and/or discriminatory behaviour towards women is accepted and/or normalised → no measurement or reporting of gender representation or equality issues → no-one accepts (or sees a need to allocate) accountability for gender equality /diversity
Phase 1: Compliant	<ul style="list-style-type: none"> → gender equality / diversity are seen as a compliance risk, not a business enabler or imperative → any gender equality / diversity activity is limited to meeting compliance obligations → responsibility for compliance with gender legislation or regulation is owned by support functions → only data required to meet compliance obligations is gathered and is not exploited
Phase 2: Programmatic	<ul style="list-style-type: none"> → gender equality / diversity activity occurs only in response to issues that can't be ignored → actions and initiatives are ad hoc, reactive and tactical rather than planned, proactive and strategic → gender initiatives are disconnected and fragmented, which limits synergies, efficiencies and impact → business priorities take precedence and displace gender equality action if/when necessary → failure of gender programs / initiatives to achieve progress or change undermines long-term support
Phase 3: Strategic	<ul style="list-style-type: none"> → a specific business case for addressing gender equality is identified and promoted by leaders → a gender strategy is developed which links to and supports business strategy and objectives → gender strategy is used to guide effort, investment and specific initiatives and is regularly reviewed → action plans are developed and implemented to realise gender equality strategic objectives → governance and reporting mechanisms are in place to ensure leadership oversight
Phase 4: Integrated	<ul style="list-style-type: none"> → gender equality best practice is integrated into business and people policies and processes → the business case for gender equality is understood and embraced at all organisational levels → commitment to, and investment in, gender equality progress is unaffected by business challenges → structural and cultural barriers to female career progression are actively challenged and addressed
Phase 5: Sustainable	<ul style="list-style-type: none"> → business leaders hold themselves and their people publicly accountable for gender equality outcomes → leaders have the necessary capability, confidence and commitment to build gender inclusive culture(s) → the organisation and its leaders are role models for gender equality / inclusion, and influence others → ongoing commitment to gender equality is unaffected by changes in leadership composition → gender equality is simply part of how business is done, and how people work together – always

How the Roadmap links to WGEA tools and resources

Most stakeholders can intuitively identify which phase they think their organisation has reached. However, their perspective will reflect how they experience gender equality in their particular part of the organisation. Perspectives may therefore differ, and this should be expected. One of the benefits of the Roadmap is that it stimulates discussion. Where assessments vary, it is valuable to explore why this is, in order to understand where there might be different approaches, levels of support and results. A coherent gender strategy will help to align the whole organisation and create consistency across sub-units and teams.

Another application of the Roadmap could be to assess an organisation's level of progress relative to its industry / sector or competitors. The new Benchmarks reporting process creates new opportunities to assess gender equality performance relative to industry peers. Sometimes, a noticeable gap in relation to external comparators can be a powerful stimulus for action, once this has been highlighted – particularly when the data is provided by an independent source.

Below, we have extended the Roadmap concept to include two important features:

- On-ramp – an opportunity to join the gender equality journey at a particular phase using WGEA tools and resources, thus reducing or eliminating time spent in the previous phase(s)
- Express lane – a short-cut from one phase to another, avoiding an intermediary phase

Annual WGEA reporting provides the catalyst to move out of the 'Avoiding' phase (0) and into the 'Compliance' phase (1). The Workplace Gender Equality Act 2012 has extended the range of employers who now need to report their gender equality performance to the WGEA. Whilst some organisations will continue to do enough to remain compliant and no more, others will use the data provided by the reporting process to accelerate their progress.

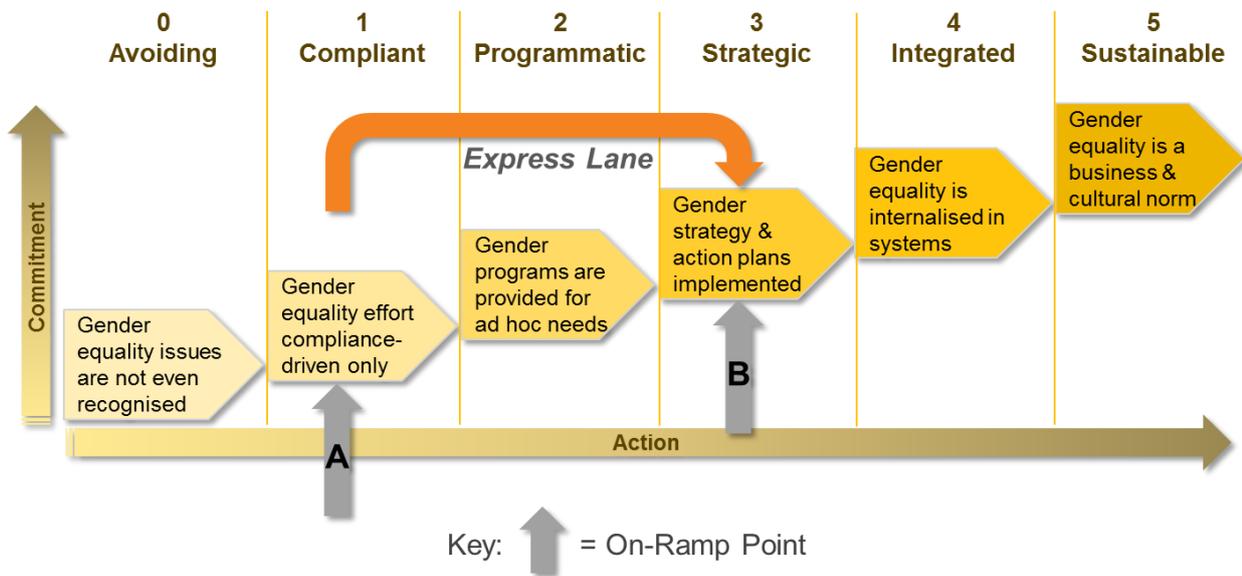
Some organisations will consciously move or slowly drift into the programmatic phase (2) in which they implement certain initiatives or programs in response to specific needs, typically relating to specific workforce segments such as working mothers. These needs may be highlighted by data from a number of sources, including WGEA annual reporting. Other sources may include internal metrics, employee feedback and engagement survey responses. Whilst these programs may be well-intentioned and welcomed by individual and groups of employees, they often only alleviate symptoms of gender inequality, rather than addressing root causes and creating lasting change.

Moving into the Programmatic phase may represent a natural but passive progression, and many organisations spend time and resources here, with little or no benefit to show for it. Worse still, a failure to demonstrate progress despite effort and investment may seriously damage stakeholder support, which is difficult or impossible to regain.

Fortunately, by exploiting the learning from WGEA reporting and Benchmarks, as well as other the insights from other data, it is possible to avoid or minimise the Programmatic phase and take an 'express lane' to the Strategic Phase (3). The vehicle by which organisations can take this short cut is the development and implementation of a gender strategy (supported by a robust and specific business case).

Once a gender strategy has been established, an organisation will be well-placed to consider applying for citation as an Employer of Choice for Gender Equality (EOGCE), provided it is executed effectively through an action plan. The structure and content of the strategy can be built around the outcomes of the Gender Equality Scorecard process which is detailed in section 4.

Table 4 On-ramps and express lanes



Explanatory notes

To use On-Ramp A:

- Submit a robust annual WGEA compliance report using appropriate due diligence
- Exploit the resulting data together with your customised WGEA Benchmarks report to identify and prioritise gender equality challenges and opportunities in your organisation
- Start taking action to address these challenges and opportunities

To use On-Ramp B:

- Use the Gender Equality Scorecard (in section X) to inform the development and implementation of a robust gender equality strategy and business case
- Apply for the EOCGE citation and (whether successful or not) use the outputs of the process to strengthen and refine the strategy; repeat the process annually until citation is achieved and maintained

To use the Express Lane (from phase 1 to 3):

- Complete the annual WGEA compliance report and in parallel use the WGEA Gender Strategy Toolkit to design, implement and communicate a robust gender equality strategy (including a specific and credible business case)
- Define and prioritise the programs and initiatives which will enable the organisation to achieve its strategic gender objective(s) contained within the strategy
- Link the gender equality strategy to business strategy.

Section 3: The Gender Equality Scorecard

Key focus and result areas

This tool enables organisations to assess their current gender equality performance against a range of specific measures – these are referred to as key focus areas and key result areas.

Focus areas relate to the essential foundations or infrastructure on which an effective gender strategy is built. **Result areas** relate to critical components of the strategy from which measurable outcomes can and should be achieved.

The focus and result areas reflect extensive research of organisational experience and international best practice in achieving gender equality progress. This research includes insights from analysis of Australian data by the WGEA from reporting over time by Australian employers.

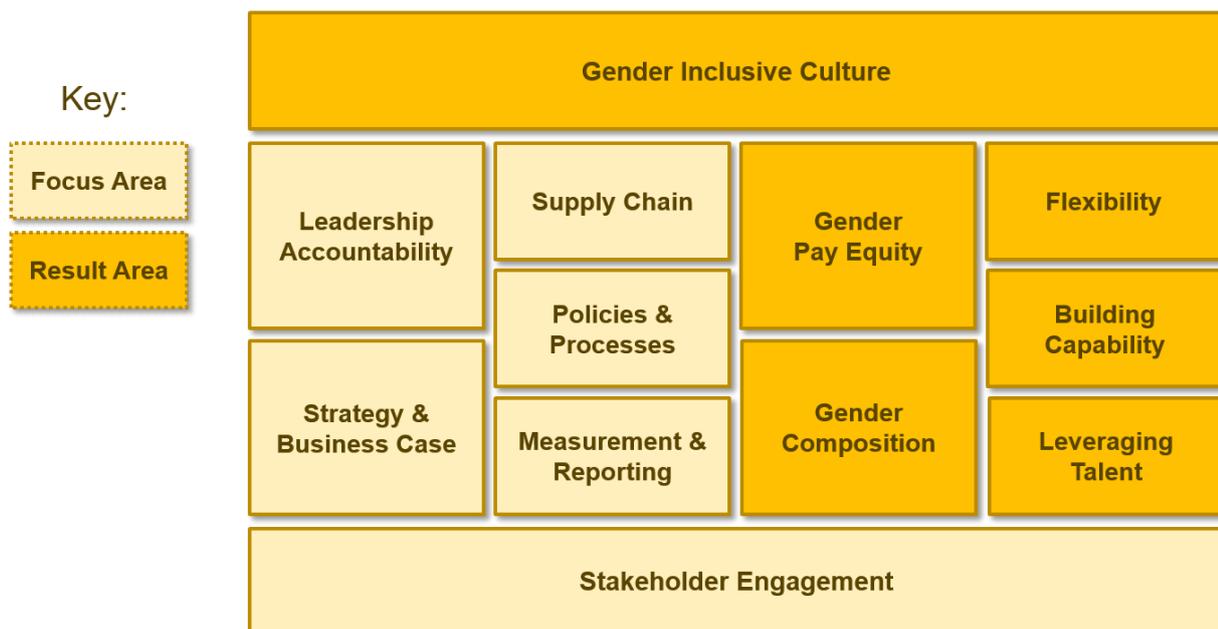
The key focus and result areas link and are complementary to other WGEA requirements and standards, specifically:

- Annual compliance reporting (including Gender Equality Indicators (GEIs) and minimum standards
- Employer of Choice for Gender Equality criteria
- Benchmarks reports against industry data and other comparators

However, some measures go further than these existing requirements – partly in anticipation of the progressive raising of future WGEA standards and expectations, and partly to challenge organisations to exceed these wherever possible in pursuit of current international best practice.

An organisation which takes credible action and invests appropriate effort and resources across the 12 key focus and result areas should maximise its progress towards genuine and sustainable gender equality. The following Toolkit sections take users through a process of organisational self-assessment and then recommend potential actions and responses to facilitate progress.

Key Focus and Result Areas



How the Scorecard links to other WGEA tools and measures

Not surprisingly, both compliance reporting measures (i.e. Gender Equality Indicators (GEIs)) and EOCGE criteria are all reflected in the key focus and result areas – they are the building blocks of an effective gender strategy.

The only exception to this relates to supply chain and procurement management to achieve gender equality outcomes. This component drives gender equality progress outside the organisation rather than inside. Nonetheless, it represents best practice and is therefore included in order to stretch organisational thinking and action when ready. It is possible that supply chain gender equality may feature in EOCGE criteria in the future.

The synergy between the Scorecard, GEIs and EOCGE criteria offers several benefits. The data gathered through annual compliance reporting and EOCGE applications will support:

- reliable and informed Roadmap and Scorecard assessments
- gap analysis and identification of priorities for action against the key focus and result areas

Even when organisations choose not to apply for EOCGE citation, they will still be able to construct a gender strategy which is ‘fit-for-purpose’ using the Scorecard methodology and informed by the outcomes of annual WGEA reporting and the associated Benchmarks comparisons.

The table below shows how the focus and result areas map against existing WGEA tools and resources.

Mapping to WGEA Tools and Resources

Key Focus / Result Area	WGEA Measures		
	Gender Equality Indicators	Employer of Choice Criteria	Benchmarks Report Reference
Stakeholder engagement	GEI 5	Criteria 5	5.1, 5.2, 5.3
Strategy & Business Case	GEI 1	Criteria 1 and 7	1.7, 3.10, 3.11, 3.12, 4.1, 4.2, 6.1
Leadership Accountability		Criterion 7	
Measurement & Reporting	Workplace profile		
Policy & Process	GEIs 1-6		1.7, 3.10, 4.1, 4.2, 6.1
Supply chain			
Gender Representation	Workplace profile		1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 2.1, 2.2
Gender Pay Equity	GEI 3	Criterion 3	3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8
Flexibility & Family	GEI 4	Criterion 4	4.1, 4.2, 4.3, 4.4, 4.5
Talent Leverage		Criterion 2	
Capability Development		Criterion 2	6.3, 6.4
Gender Inclusive Culture	GEI 6	Criterion 6	

Section 4: Mapping your current position

We are now at stage 1 of the change process ('Analysis').

Question to ask: "Where are we now?"

Applying the Gender Equality Scorecard

The Gender Equality Scorecard provides a basis for consistent and robust assessment of an organisation's current gender equality progress and performance against best practice indicators (which we have called 'Signposts'). It does this by setting the core gender strategy components (Key Result and Focus Areas) against each phase of the Gender Equality Roadmap.

This is not intended to be a formulaic or algorithmic methodology. Assessment requires application of judgement, informed by direct observation or experience, and supported by relevant data sources (both qualitative and quantitative).

In this way, stakeholders in organisations can assess their current status against best practice indicators (the 'Signposts'). Different stakeholders may have varying perspectives and therefore score the organisation differently, according to the nature of their role and connection to the gender equality agenda (e.g. business leader, gender champion, team leader, team member, HR manager, diversity practitioner etc.).

This is not only to be expected, but also valuable insight. Exploring the reasons behind different perspectives may uncover issues which are specific to particular parts of the workforce. Understanding the issues better can inform development of solutions which are more effectively targeted.

The more inputs that are gathered, the more robust and useful the aggregated picture will be. Consulting with stakeholders in this way, and seeking their inputs, is also an engagement and support-building process in itself.

One of the most useful features of the Scorecard is in identifying priorities for action; inevitably, organisations will perform more strongly against some focus and result areas than others; weaker scores suggest an area for prioritisation.

The overall Scorecard assumes equal weighting for each focus and result area. Some organisations may validly place more emphasis on certain elements than others, according to their own particular context.

However, no focus or result area should be seen as irrelevant, because they are all components of an effective, comprehensive gender strategy, which reflects best practice. It is for each organisation to determine whether they wish to place more emphasis on one component than another.

Organisations may be more advanced in some areas than others; individual scores against focus and result areas can be aggregated and averaged to indicate an overall position on the Roadmap.

WGEA data sources will include:

- Annual WGEA compliance reports (including Workforce Profiles)
- WGEA Benchmarks reports
- EOCGE submissions and outcomes

Other relevant internal data sources are likely to include:

- Policies, procedures and people management frameworks (e.g. capability models)
- Results from employee engagement or diversity surveys
- Quantitative metrics (e.g. talent pool composition, development program participation, flexibility utilisation, performance distributions, gender pay equity etc.)
- Performance against relevant KPIs and business scorecard measures, if applicable

- Relevant business practices (e.g. project and client account allocation, procurement etc.)
- Leadership communication relating to gender equality, including the business case

When organisations have evaluated themselves, the 'Where to Next?' section suggests potential actions to improve gender equality performance and accelerate progress along the Roadmap. The Scorecard results and suggested responses can then be used to inform the development of specific gender equality action plans.

Scoring

Scoring is a two-step process:

- Step 1: Detailed Assessment - score your organisation against each of the key result and focus areas using the Signposts provided
- Step 2: Overall Assessment – aggregate your detailed scores to provide an overview of your organisation's current gender equality position and performance.

The pages which follow provide the templates to be completed for steps 1 and 2.

Stakeholder Engagement

A stakeholder is an individual or group who/which has an interest in, or an ability to influence, a given outcome.

Internally, all employees (and at different levels) have a role in gender equality; externally, stakeholders could include (but are not limited to) customers or clients, communities, shareholders, trade unions, professional or industry bodies, regulators and government.

Different stakeholders have varying needs and expectations regarding gender equality; engaging and building support with each (individual or group, male and female) requires regular, two-way interaction to identify and respond to these.

Roadmap Phase	Signposts	Your org
0 Avoiding	No appreciation of the many stakeholders in gender equality: it is seen as a working mothers' issue and women's responsibility	
1 Compliant	Government and/or regulators are now seen as additional stakeholders because of their role in gender equality outcomes	
2 Programmatic	Individual stakeholders beyond working mothers are engaged but only to develop and execute specific initiatives or programs	
3 Strategic	A full range of gender equality stakeholders (male and female, internal and external) is identified during strategy development	
4 Integrated	Key stakeholders (individuals and groups) are engaged in the gender equality agenda using a planned, proactive approach	
5 Sustainable	Stakeholder engagement in gender equality issues forms part of normal day-to-day workplace and business interactions	

Where to next?

- Begin to develop a 'map' of gender equality stakeholders (groups and individuals) – use the WGEA guide and template (TBC); gauge levels of support, resistance and indifference
- Begin engaging with individuals and groups of stakeholders on the topic of gender equality; refer to positive external developments involving clients, competitors and industry groups etc.
- Begin awareness-raising through internal communications on gender equality such as internal storytelling and celebrating business successes with a gender-related dimension or link
- Develop a strategic stakeholder communication and engagement plan which identifies the needs and expectations of individuals and groups; begin implementation of the plan
- Deploy a range of communications and engagement strategies (e.g. third party influencing); ask supportive, credible leaders to influence their peers; involve customers and key stakeholders
- Embed gender equality messaging into regular, routine business communications from leaders; highlight role-models and position the organisation as an industry leader and shaper

Business Case & Strategy

A coherent gender equality & diversity strategy is the basis for:

- targeting effort and resources towards clear gender equality objectives (immediate and longer term)
- linking gender equality objectives to business strategy, plans and goals
- communicating strategic intent regarding gender equality to stakeholders
- ensuring synergies and economies of scale are exploited through consistent and concerted action

A business case – specific to your organisation and supported by reliable data – is a key foundation for the strategy.

Roadmap Phase	Signposts	Your org
0 Avoiding	No gender equality strategy and no recognition of a need for or benefit from one (because no case has been made)	
1 Compliant	The value of a gender strategy and supporting business case is not recognised because they are not required to be compliant	
2 Programmatic	A business case may be prepared for discrete initiatives or programs but no overall gender strategy links these together	
3 Strategic	The value of a gender strategy based on a credible business case has been recognised and they have been developed	
4 Integrated	A fully transparent gender strategy is used to guide all future gender equality investment and activity then assess outcomes	
5 Sustainable	Gender equality strategic objectives (if required) are embedded into business strategy, workplace culture and behaviours	

Where to next?

- Gather data which helps start a conversation about gender equality (e.g. market, customer or competitor practices) and use or create opportunities to share this with influential stakeholders
- Collate, analyse and (where possible) distribute available internal data which help to highlight issues, costs and risks that may arise from gender inequality (e.g. female turnover rates)
- Seek feedback and perspectives on gender equality, diversity and inclusion in your organisation from a range of credible men and women; address areas where you need more data / insight
- Socialise and test a draft business case and gender equality strategy with a representative range of leaders and other stakeholders; identify resistance points and adapt the proposal
- Keep the gender business case and strategy alive; use them as key references – to assess (and communicate) progress and successes, and re-emphasise linkage to business strategy
- Embed gender equality principles and values into your organisation's future vision, business strategies and culture statements so that a separate gender strategy isn't needed

Leadership Accountability

Visible leadership commitment to gender equality is a critical success factor

This commitment needs to be communicated regularly to employees and other stakeholder groups within broader business messaging; communication includes what leaders say and do, as well as what they value and reward, and the expectations they set of others.

To translate verbal commitment into meaningful action, leaders need to hold themselves and others accountable for measurable progress and tangible outcomes with respect to gender equality.

Roadmap Phase	Signposts	Your org
0 Avoiding	No-one is accountable for gender equality and no-one sees a need for such accountability	
1 Compliant	Support functions such as Human Resources are seen as accountable for ensuring compliance with relevant legislation	
2 Programmatic	Individual managers or leaders take or are given accountability for discrete gender equality projects or initiatives	
3 Strategic	Senior leadership team recognises the need for gender equality action and actively communicates its role in driving progress	
4 Integrated	Formal accountability for gender equality progress & outcomes has been defined and cascaded through management levels	
5 Sustainable	Maintaining gender equality is seen as everyone's responsibility but for which leaders and managers are routinely accountable	

Where to next?

- Gather articles / examples of visible leadership on gender equality issues, plus best practice research / guidance from advocacy bodies; share these opportunistically with leaders
- Gather and share internal data which demonstrates gender inequality and its impact; this will enable gender equality to be positioned as a business issue requiring leadership focus
- Challenge, advise, coach and support individual leaders to sponsor, champion or lead a gender equality initiative; recognise their contribution and communicate their successes
- Establish a formal body (led by credible, influential leaders of both genders) to take accountability for the execution of gender equality strategy; communicate its role and membership
- Develop, pilot and implement a gender equality scorecard for the organisation and sub-units; follow-up with KPIs for leaders and managers: link remuneration to gender equality outcomes
- Position maintenance of gender equality, diversity and inclusion as a business objective which is measured, managed and rewarded as any other business imperative is

Measurement & Reporting

Establishing an effective governance structure to oversee diversity progress is a prerequisite for success.

The executive team, a sub-group of it, or a specific council or forum can provide the necessary oversight; whatever model is used, visible business ownership, oversight and leadership of the gender equality strategy is critical. Robust reporting of key metrics is core business discipline for understanding organisation or team performance. Gender equality and diversity are no different.

Reporting highlights whether or not interventions are delivering the expected results and return on investment (and, if not, which areas require corrective action or improvement).

Roadmap Phase	Signposts	Your org
0 Avoiding	No data-gathering or reporting related to gender equality or diversity occurs because no value is attached to these	
1 Compliant	Gender data-gathering and reporting only to meet compliance obligations; ownership rests with one or more support functions	
2 Programmatic	Gender data-gathering and reporting is limited to specific issues and needs when they arise; no defined leadership oversight	
3 Strategic	Proactive data-gathering and reporting informs gender strategy design and implementation, of which there is oversight	
4 Integrated	Gender equality / diversity metrics form part of routine management information which informs leadership action planning	
5 Sustainable	All key business and people performance metrics are reported with a gender 'lens' applied	

Where to next?

- Proactively begin the collation of gender data where it is already available, or initiate analysis of existing business and/or people reporting from a gender perspective
- Identify and/or create opportunities to share compliance-related data (e.g. WGEA Workforce Profile) with a broader stakeholder audience: add impact by analysing data and its implications
- Create the mechanisms and databases to capture and store fragmented gender data, so that it can be opportunistically exploited in future; begin identifying and addressing 'hot spots'
- Develop a gender diversity 'dashboard' which succinctly captures key metrics for stakeholders; seek or create regular opportunities to report / present the dashboard to leaders
- Research and understand existing business reporting mechanisms; explore how gender data could be integrated into these with report owners and add value for report users
- Continue to identify or create opportunities to enhance gender reporting and strengthen its linkage between business decisions and outcomes; analyse and provide insights to business leaders

Policies & Processes

Progress towards fully sustainable gender equality, diversity and inclusion requires best practice to be integrated into the design and operation of key policies and processes – both business and people-related.

If policies and processes are not audited and optimised, their outcomes are unlikely to be gender-equitable: barriers which impact women disproportionately relative to men will continue to create gender inequality.

Business processes include allocation of work, projects and customers /clients, problem-solving and decision-making. People processes encompass the organisation’s approach to management of its employees throughout their tenure.

Roadmap Phase	Signposts	Your org
0 Avoiding	Gender inequalities arising from lack of policies / processes or the design and operation of existing ones are unrecognised	
1 Compliant	Policies and processes (or elements) relating to gender equality only exist where they are required by law or regulation	
2 Programmatic	Some policies and processes relating to gender equality may have been developed but only on an ‘as needed’ basis	
3 Strategic	Specific gender equality policies and processes are introduced proactively to support gender strategy and objectives	
4 Integrated	Policies and processes impacting gender equality are reviewed and refined holistically to ensure coherence and synergy	
5 Sustainable	Gender equality objectives are fully embedded within business and people policies and processes rather than ‘standing alone’	

Where to next?

- Research industry and/or national best practice policy provision and conduct gap analysis with own organisation; share findings and assessment of risks and costs created with key leaders
- Consult advocacy or industry bodies on appropriate gender policies or processes; adapt examples from comparable peer organisations which demonstrate leading gender practice
- Gather employee feedback from a range of sources (e.g. in person, focus groups, exit interviews, surveys) to identify gaps in policies and processes or opportunities to improve them
- Align ongoing policy and process development with strategic gender objectives; invite employee resource groups / networks to advise on policy needs and test / validate new processes
- Develop mechanisms to monitor the ongoing effectiveness of policies and processes from a gender perspective – through quantitative and qualitative data
- Continue monitoring the impact and effectiveness of policies and processes from a gender perspective so that they reflect changes in the organisation and its operating environment

Supply Chain

Leading organisations in gender equality recognise the importance of ensuring their procurement principles and practices, and overall supply chain management, are consistent with, and actively support, its gender equality objectives.

Leveraging external commercial influence can help drive industry and national progress towards gender equality more quickly – it requires organisations to play a leadership role within their sphere of influence.

There are strong reputational and brand benefits from adopting supply chain practices which promote gender equality – for the full range of stakeholders, including employees and customers.

Roadmap Phase	Signposts	Your org
0 Avoiding	The relevance of procurement / supply chain policies and practices in relation to gender equality outcomes is not recognised	
1 Compliant	Australian laws and regulations do not require procurement / supply chain policies and practices to promote gender equality, so no compliance driven activity occurs	
2 Programmatic	Promotion of gender equality through procurement / supply chain practices is limited to specific vendor types (e.g. recruiters) and ad hoc tender responses	
3 Strategic	Organisation-wide procurement / supply chain policies and practices in relation to gender equality are mandated and communicated	
4 Integrated	Procurement / supply chain systems and related business processes are adapted to support gender equitable policies and outcomes are monitored	
5 Sustainable	Using supply chain influence to promote gender equality is an expected and intrinsic part of all procurement practices and aligns to organisation culture / values	

Where to next?

- Conduct an audit of all current suppliers to check for consistency with gender equality policies and strategy, as well as brand proposition, and organisational culture and values; identify anomalies and develop an action plan to address each one.
- Develop a set of procurement principles and terminology which promote gender equality and integrate these into policies and practices (e.g. tendering processes and documentation).
- Communicate (internally and externally – e.g. through annual and/or sustainability reports) the organisation's commitment to promoting gender equality through its supply chain management and procurement practices.
- Brief existing and potential suppliers on the changes to procurement policies and practices, and educate them about the value of gender equality and the business benefit this provides
- Support existing and potential suppliers (as appropriate) to achieve the necessary gender equality standards within new procurement policies and practices.
- Review and monitor the way in which the organisation's and its suppliers' advertising and marketing practices portray women; challenge and change these where appropriate

Gender Representation

Building gender-balanced teams at every level of the organisation improves engagement, retention and performance.

Gender balance at leadership, executive and board levels is particularly important, because it improves the quality of problem-solving, decision-making and development of solutions.

Gender diverse teams are also more innovative, because they draw on greater diversity of thinking. Organisations need to track and influence the inflows and outflows of female talent at each organisational level.

Building a robust, gender-diverse talent pipeline, especially to leadership levels, is key to sustainable gender equality.

Roadmap Phase	Signposts	Your org
0 Avoiding	The organisation and its leaders / managers are 'blind' to the gender composition of teams, levels and the overall workforce	
1 Compliant	The gender composition of the workforce and segments within it are only monitored and reported to the extent required by law	
2 Programmatic	Selective monitoring of gender for high-need or high-profile groups / segments; data utilisation is reactive and tactical	
3 Strategic	Team and overall workforce gender composition is monitored as are business and people process outcomes by gender	
4 Integrated	Organisation-wide gender balance is a business objective which is supported by proactive monitoring and action-planning	
5 Sustainable	All business and people decisions reflect the ongoing objective of sustained workplace gender balance and equality	

Where to next?

- Raise consciousness of gender composition differences between teams through conversations, in meetings, and leadership forums etc. Generate debate on causes and effects
- Utilise the compliance-driven gender composition data by proactively analysing their implications and reporting these to potential stakeholders –particularly leadership teams
- Extend gender composition data-gathering for selected populations to all teams, units and levels; create frameworks for regular gender reporting to leaders, executive and board
- Establish action planning to address gender gaps and monitor impact; adopt a whole of pipeline and a dynamic view – track inflows and outflows of talent by gender and plug leaks
- Monitor work / project / customer allocation by gender; evaluate business outcomes from a gender perspective; link workforce gender presentation to customer and other external metrics
- Capture data to demonstrate the benefits arising from gender balance, equality and inclusion; share these with external stakeholders to promote similar commitment and action

Gender Pay Equity

Gender pay equity is not only an issue of fairness; it is a key driver of gender equality and diversity overall, because it impacts an organisation's ability to attract, engage and retain talented women. Pay equity operates at 2 levels: organisational and in relation to comparable roles and/or job families.

Overall pay equity within an organisation requires gender-equitable opportunity for career progression (i.e. to the most senior (and usually higher paid) roles); this, in turn, requires the removal of barriers to progression.

Gender pay equity between comparable roles requires bias-free decision-making (e.g. performance reviews).

Roadmap Phase	Signposts	Your org
0 Avoiding	Gender pay equity is not recognised as a relevant business or people issue and no data is available or sought	
1 Compliant	Gender pay equity data-gathering, analysis and reporting is only conducted to the extent required by law and not acted upon	
2 Programmatic	Gender pay equity data-gathering, analysis and action takes place in response to specific issues as and when they emerge	
3 Strategic	Gender pay equity is understood as a driver of overall equality; approaches are developed to regularly capture and act on data	
4 Integrated	A comprehensive, integrated and proactive approach exists to address gender inequities in performance and pay practices	
5 Sustainable	Pay policy design and practice is transparent and bias-free; gender-equitable reward is a business and cultural norm	

Where to next?

- Gather data, case studies and examples of good or best gender pay equity practice in your industry and/or nationally; use this opportunistically to generate and inform debate on the issues
- Identify or create opportunities to report gender pay equity data to leaders and other stakeholders; provide analysis and commentary on risk implications (e.g. female talent retention)
- Develop a more holistic approach to gender pay equity analysis and reporting across all levels, job families and key roles; where possible, integrate pay equity data into broader people metrics
- Gender pay equity is an explicit, transparent objective of both remuneration and equality / diversity strategy; it is supported by a specific business rationale; reporting is conducted annually
- Pay equity reporting includes year-on-year trend data for all key populations; it is used as a basis for corrective action where macro and micro-inequities are identified
- Gender pay equity data is regarded as routine management information; corrective action is a business process which continues until stable, consistent gender pay equity is sustained

Flexibility

Organisational research and experience indicate that work and career flexibility is a key driver and enabler of equality, diversity and inclusion; women are disproportionately impacted by family-friendly policies and practices or their absence.

There are clear business benefits available to organisations which embrace flexibility and provide equitable access to it; these include talent attraction and retention, engagement and productivity, and agility – all of which translate into stronger individual and collective performance.

Genuinely flexible organisations develop a culture of flexibility, as well as implementing robust policies and processes.

Roadmap Phase	Signposts	Your org
0 Avoiding	No recognition of how effective flexible work and family-friendly policies / practices can promote gender equality and diversity	
1 Compliant	Generic flexible work and family-friendly policies / practices only exist to the extent they are required by legislation or regulation	
2 Programmatic	Flexible work and family-friendly policies / practices are provided to meet the needs of specific groups or individuals	
3 Strategic	Flexible work and family-friendly policies / practices are designed and accessible to benefit all employees	
4 Integrated	Flexible work and family-friendly policies / practices are recognised and leveraged as a business enabler	
5 Sustainable	Collaborating and doing business in a flexible, family-friendly way is routine, expected and a cultural norm	

Where to next?

- Identify flexible and/or family-friendly work practices that have occurred naturally in the organisation; analyse and record success factors and share positive stories opportunistically
- Use compliance-driven flexible / family-friendly work practices as a foundation for more; encourage managers and employees to try more or different options, and actively promote successes
- Ensure flexibility policy content is inclusive and options are accessible to all employees – without bias or value judgements; ensure family-friendly policies do not disadvantage some staff
- Build and promote ‘whole team’ approaches to flexibility and family-friendliness rather than ad hoc individual ones; train, coach and support team leaders to manage flexible teams
- Develop mechanisms to track occurrence of flexible and family-friendly work practices and target areas of need; communicate successes that have been achieved by teams working flexibly
- Remain open to new ways of working as technology and other factors create change; strengthen your organisation’s brand by helping stakeholders (e.g. customers) achieve progress

Leveraging Talent

Capitalising refers to an organisation's ability to identify, attract, develop, mobilise, utilise and retain female talent.

Capitalising on both male and female talent is critical; however, research and organisational learning indicates that, in many workplaces, there are structural and cultural barriers to equitable career progression for women.

Capitalising on female talent is about:

- creating a 'level playing field' for women and men;
- eliminating barriers specific to women;
- enabling women and men to equally realise their full potential and to maximise their contribution to organisational success.

This focus applies throughout the employee life-cycle: from joining to leaving the organisation.

Roadmap Phase	Signposts	Your org
0 Avoiding	The organisation and its leaders are unable and/or unwilling to recognise the 'un-level playing field' for women and their careers	
1 Compliant	Recruitment / talent processes are compliance-driven; the value of enabling / empowering female talent remains unrealised	
2 Programmatic	Investment in female talent focuses on developing capabilities necessary to survive / succeed in a male-centric workplace	
3 Strategic	Female talent investment is linked to gender strategy, and leverages the different capabilities of both women and men	
4 Integrated	Talent definition / identification, leadership capability models, and access to development are gender-equitable and bias-free	
5 Sustainable	Access to development is gender-equitable for employees at all levels; talent is fully leveraged, irrespective of gender	

Where to next?

- Start collecting data – qualitative and quantitative – on how male and female talent is leveraged: recruitment, development, promotion etc. Analyse and record differences for future use
- Use the data which indicates male and female talent has a different experience to highlight the potential costs and risks this creates for the organisation as well as its inherent inequality
- Use research indicating gender diverse teams outperform uniform teams to build the case for valuing and developing the complementary strengths of women and men equally
- Further analyse data to identify the underlying causes of gender-based inequality in career opportunities; review talent processes / frameworks (e.g. capability models) for gender bias
- Monitor and manage participation in development activity by gender to ensure equity and balance; capitalise on female and male examples of career success and leadership role-models
- Promote the benefits of fully utilising female and male talent externally; provide industry leadership and support to other organisations who aspire to achieve the same outcome

Building Capability

Achieving gender equality through the building of gender-diverse, inclusive and flexible teams and organisations requires knowledge, skill and supportive attitudes amongst all employees – and particularly managers and leaders.

Individuals will possess these capabilities to differing degrees and some will require support from the organisation to gain the requisite level of competence and confidence.

Equitable opportunity for development of other key capabilities for all employees, irrespective of individual difference (e.g. gender), is a key foundation of equitable career advancement and diverse leadership teams.

Roadmap Phase	Signposts	Your org
0 Avoiding	The capabilities required to build and maintain gender equity in teams and the organisation are not recognised as relevant	
1 Compliant	Capability-building is limited to raising awareness of equality legislation compliance responsibilities for all employees	
2 Programmatic	Individual development addresses specific gender equality needs as they arise and focuses on knowledge rather than skills	
3 Strategic	Capabilities required to build and maintain gender equitable teams are recognised and development resources are available	
4 Integrated	Developing capability to build gender equitable teams and workplaces forms part of broader leadership development	
5 Sustainable	Gender equality capability (individual / organisational) embeds through inclusive role-modelling, coaching and teamwork	

Where to next?

- Gender equality capability-building will start with awareness-raising: why it matters and how it contributes to organisational success; develop a communication plan to support this
- Developing capability (individual and organisational) requires motivation to learn and change; promote gender equality benefits beyond compliance and that everyone has a role in it
- Use gender equality initiatives and activity as a vehicle for increasing understanding of gender equality issues and support for addressing them; engage and educate participants
- As the business case for gender equality becomes better understood and supported, assess and address development needs of managers and leaders to take responsibility and act
- Adopt a more structured approach to building gender equality capability by integrating development activity into existing and new learning programs and modules, particularly for leadership
- Maintain a suite of learning methodologies and content to meet ongoing gender equality development needs of different stakeholders, as they move or progress internally and externally

Gender Inclusive Culture

Organisation culture can be described as a collective set of attitudes and values which are recognised and shared by all employees as fundamental to the way business is conducted and the way work is delivered.

Some organisations explicitly define and communicate values, principles, codes and behaviours which are valued and expected in their particular workplace; sometimes, these reflect existing reality; at others, they are aspirational.

To achieve sustainable gender equality, an organisation's culture will need to foster appropriate attitudes, values and behaviours which support and are congruent with gender strategy; sometimes, this will require culture change.

Roadmap Phase	Signposts	Your org
0 Avoiding	Gender-specific barriers are unrecognised and unaddressed; 'it is what it is'; there is no awareness of a need to shift culture	
1 Compliant	Cultural norms, attitudes and behaviours regarding gender equality are defined only by anti-discrimination / EEO legislation	
2 Programmatic	Disconnected initiatives attempt to influence gender-related aspects of culture and behaviour but they lack impact	
3 Strategic	Gender equality forms part of a defined and communicated aspirational culture and the supporting values and behaviours	
4 Integrated	Desired cultural norms, values and behaviours are actively influenced by integration into leadership and capability models	
5 Sustainable	A gender equitable and inclusive culture is intuitive to all employees and defines how all business and work is conducted	

Where to next?

- Position gender equality progress as a function of culture change, not just policies, processes and programs; it requires appropriate attitudes and values, driven by visible leadership
- Communicate with stakeholders to increase understanding that legislative compliance is the lowest standard and gender best practice is the highest; identify and start addressing the gaps
- Identify opportunities to integrate gender equality, diversity and inclusion action into broader organisation culture change and leadership development activity when this occurs
- Ensure that gender equality / inclusion and culture change messaging is consistent, synchronised and mutually supportive; assist leaders to communicate and promote these effectively
- Build the capability to measure and monitor gender equality / inclusion progress and culture change through qualitative data-gathering mechanisms e.g. employee feedback and surveys
- Leverage the organisation's cultural strength by influencing external stakeholders to follow its example; support customers, partners, community groups etc. to make similar progress

Overall assessment

Below are a template and an example of the second and final step in the assessment process in which the individual scores against each key focus and result areas are consolidated in one place.

This presents a comprehensive overview of how your organisation is performing in the areas critical to success for gender equality progress and outcomes – as judged by key stakeholders. It also enables organisations to determine an aggregated view of where they are currently positioned on the Gender Equality Roadmap

Review the hypothetical example first and then complete the blank template underneath for your own organisation. This Toolkit can be forwarded to other individual stakeholders or groups, in order to obtain a broader (and more inclusive) picture of how your organisation's gender equality performance is assessed.

If this Scoring methodology is considered helpful and effective by user organisations, the WGEA will consider developing a web-based Scorecard, which will make the process easy to communicate, use and distribute within your organisation.

Key Focus / Result Area	Gender Equality Roadmap Phase					
	0 Avoiding (0 points)	1 Compliant (1 point)	2 Programmatic (2 points)	3 Strategic (3 points)	4 Integrated (4 points)	5 Sustainable (5 points)
Stakeholder Engagement		√				
Strategy & Business Case		√				
Leadership Accountability				√		
Measurement & Reporting			√			
Policies & Processes		√				
Supply Chain	√					
Gender Representation			√			
Gender Pay Equity		√				
Flexibility	√					
Leveraging Talent		√				
Building Capability			√			
Gender Inclusive Culture		√				
Points Sub-totals	0 (2 x 0)	6 (6 x 1)	6 (3 x 2)	3 (1 x 3)		
Total Score	15 (sum of sub-totals)					
Overall Indicative Roadmap Phase	1 (15/12 = 1.25 then rounded (down))					

Now that you have understood the scoring methodology in step 2, please apply it to your own organisation, using the template below:

- Transfer your individual scores for each focus and result area (pages 21-32) on the template by placing a tick in the relevant box
- Calculate the sub-totals (i.e. according to how many ticks there for each column (Roadmap phases))
- Add the subtotals together then divide this figure by 12 (the number of focus and result areas)
- Round this figure up (.5 or more) or down (less than .5) to produce a whole number
- This number represents the overall indicative Roadmap phase for the organisation.

Key Focus / Result Area	Gender Equality Roadmap Phase					
	0 Avoiding (0 points)	1 Compliant (1 point)	2 Programmatic (2 points)	3 Strategic (3 points)	4 Integrated (4 points)	5 Sustainable (5 points)
Stakeholder Engagement						
Strategy & Business Case						
Leadership Accountability						
Measurement & Reporting						
Policies & Processes						
Supply Chain						
Gender Representation						
Gender Pay Equity						
Flexibility						
Leveraging Talent						
Building Capability						
Gender Inclusive Culture						
Points Sub-totals						
Total Score						
Overall Indicative Roadmap Phase						

Section 5: Planning your future journey

We are now at stage 2 of the change process ('Design').

Questions to ask: "Where do we want to be (and why)? / "What is the best route to get there?"

Creating or refining your strategy

The process for developing a strategy (whether you are doing this for the first time or improving what's already in place) need not be a complex process. The key is to ensure that all the relevant data has been gathered and considered, in order to define your gender equality objectives.

The Gender Equality Roadmap and Scorecard are intended as the essential thinking framework which will enable organisations to develop and maintain a gender strategy which is relevant, coherent, succinct and which adds value (i.e. it will increase impact and the rate of change). Of course, as we have indicated earlier in the Toolkit, there are also a number of additional, complementary data sources (internal and external – e.g. WGEA Benchmarks reporting) to help inform decision-making.

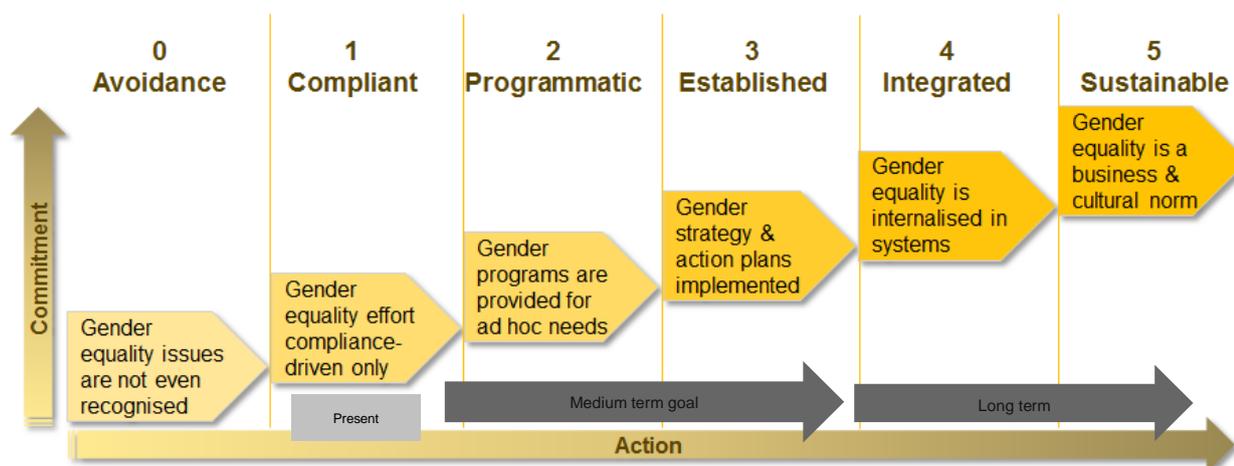
We recommend that you use the key focus and result areas as the framework for your strategy, as explained below. The Scorecard process should have identified areas in which the organisation is performing more and less effectively. Use this information to prioritise where you wish to concentrate effort and investment.

Bear in mind that it will be harder to make progress against the result areas, unless most or all of the focus areas have been satisfactorily addressed first.

Building a vision

In developing your workplace gender equality strategy, it is important from the outset to consider your organisations overall vision and strategy to ensure alignment. When setting broader gender equality goals, it is recommended you revisit the gender equality roadmap and consider how your organisation wishes to move along the roadmap and the appropriate time frame.

Figure 2 Example goals on the gender equality roadmap



* Adapted from a model developed and shared by Diversity Partners Pty Ltd © 2013

For example in Figure 2 above, an organisation may set the goal of moving from a compliance phase to strategic in the medium term. This may also include goals of improving performance against gender equality

indicators or becoming an Employer of Choice for gender equality. Over the long term the organisation may set the goal of reaching the sustainable phase.

Other goals that an organisation may seek to achieve include:

- become an employer of choice for gender equality
- stand out and lead the industry in gender equality
- further develop a unique and gender-equitable employee value proposition
- specific cost reductions as a result of improvements to gender equality (e.g. reduced cost of turnover)

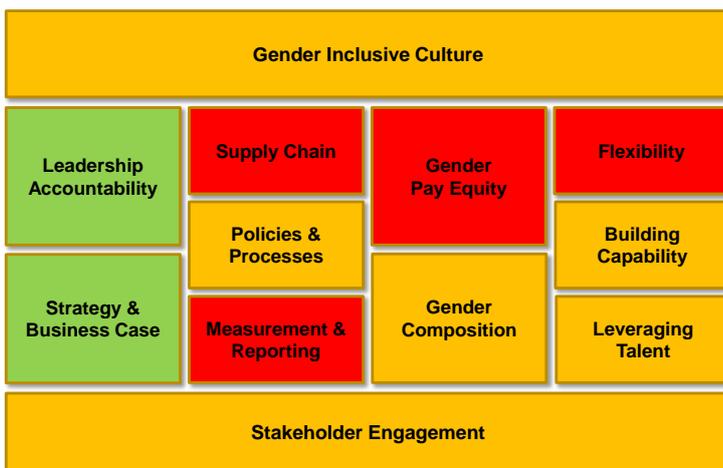
The vision and goals that are set will influence the strategies and actions that are developed.

Setting specific goals and priorities

One of the most useful features of the Scorecard and assessment framework set out in section 4 is in identifying priorities for action; inevitably, organisations will perform more strongly against some focus and result areas than others; weaker scores suggest an area for prioritisation.

It may be useful to develop a ‘heat map’ which indicates how an organisation is performing (at a high level) against the key result and focus areas. Figure 3 below provides an example of such a heat map. In this example the organisation has gained leadership commitment and understands the business case, it is likely that this organisation is in the programmatic phase. The yellow and red areas highlight where focus needs to be placed.

Figure 3 Example heat map



Example key:

- GREEN: where your organisation is performing well against the relevant key result and focus areas;
- YELLOW: where your organisation is performing adequately against the relevant key result and focus areas but additional focus and effort is required;
- RED: where your organisation is presented with a significant opportunity to make progress.

Using a heat map helps to communicate the areas of greatest priority and assists in developing a strategy that is tailored and specific to your organisation. Within each of the key result and focus areas, it is recommended to set specific goals. Various toolkits are available to assist you in doing this. For example, the WGEA Target Setting Tool can assist in setting gender composition targets, and the Guide to Pay Equity Toolkit can assist in setting pay equity goals.

We also recommend consulting your customised benchmark report to understanding your relative performance in relevant key result and focus areas and set goals based on the status of gender equality in your industry.

Strategy Development Process

A practical process for developing a strategy is:

- Assemble a small strategy development working group (which includes several stakeholders)
- Collate and analyse all the necessary data
- Review and agree the implications of the data
- Identify which of the key focus and result areas are priorities
- Develop draft objective(s) for each of these areas

We suggest that before strategy is developed further, draft strategic gender objectives are socialised, tested and validated with a broader set of stakeholders. This might include the executive or senior leadership team, a diversity council if one exists or women's networks or resource groups.

This will help to create a sense of involvement, ownership and engagement amongst key stakeholders. It will also help ensure assumptions are valid and the objectives are appropriate and optimal – through the power of the application diverse thinking.

Finally, this consultative process will ensure that time and effort is not wasted developing the detail of how gender objectives will be achieved, only to have these adjusted later.

Strategy Framework

When the objectives have been endorsed, the remainder of the detail can be completed. Set out below is a clear, simple and practical structure for headings within a gender strategy. These are followed by some examples of the essential information anticipated under each heading.

- Context
 - Organisation specific gender equality business case
 - Linkage to business strategy
 - Supporting data (quantitative and qualitative)
 - Assessment of current state – refer to Roadmap / Scorecard outcomes and Benchmarks report
 - Statement of vision / values (if applicable)
- Focus / Result Area(s) – as identified by the Scorecard process as priorities
 - Objective(s)
 - Action / response
 - Success factors / enablers
 - Risks / barriers
 - Outcomes / benefits
 - Measurement of impact / progress / return on investment (ROI)
- [Repeat the above for each focus / result area that has been prioritised for inclusion]
- Timeframe – sequencing of actions for each objective (over next 2-3 years)
- One-page strategy summary: for easy, effective communication

A strategy does not necessarily need to be a complex document. A simple, succinct and focused articulation of strategic direction is easier for leaders to communicate, employees to understand, and for everyone to mobilise around.

Example 1 - Leadership Accountability

Focus / Result Area	Leadership Accountability
Objective	Embed senior leadership team (SLT) accountability for gender equality into existing regular business meeting practices
Action / response	Propose and gain CEO agreement to review gender equality progress as a standing agenda item at SLT meetings every quarter supported by robust gender reporting

Focus / Result Area	Leadership Accountability
Success factors / enablers	<ul style="list-style-type: none"> → CEO support and ability to influence / challenge SLT → Robust reporting mechanisms to drive quarterly reviews → Transparency of business unit gender data within SLT → SLT members ownership and action in response to data
Risks / barriers	<ul style="list-style-type: none"> → Other business priorities / distractions displace gender equality focus → SLT members resist formalised ownership and accountability → Process promotes unhealthy competition / negative behaviour amongst SLT members → Momentum and focus decreases after initial energy → Metrics are insufficient to support the process
Outcomes / benefits	<ul style="list-style-type: none"> → Focus on gender equality becomes normalised as a business imperative → Ongoing focus and transparency drives action and accelerates progress → SLT members cascade accountability down through their own structures
Measurement of impact / ROI	<ul style="list-style-type: none"> → Quality and frequency of action planning in response to metrics → Improvement in key gender metrics in dashboard / scorecard → Visible sponsorship / ownership by SLT members of specific interventions

Example 2 - Leveraging Talent

Focus / Result Area	Leveraging Talent
Objective	Ensure all candidate pools for job vacancies and interview panels are gender diverse
Action / response	<ul style="list-style-type: none"> → Revise recruitment policy and hiring manager training to communicate new approach and business benefits → Develop data-gathering mechanisms to track gender composition of each key recruitment stage → Review and revise recruitment agency service level agreements to ensure vendor alignment
Success factors / enablers	<ul style="list-style-type: none"> → Hiring manager buy-in and supportive behaviour → Ability of HR managers to identify challenge and homogeneous candidate pools → Ability of recruitment agencies to source gender diverse candidate pools and provide accurate timely reporting
Risks / barriers	<ul style="list-style-type: none"> → Hiring manager resistance to policy changes → Recruitment agencies source weak female candidates to easily create gender diverse candidate pools → Over-use of individual female managers to participate in interviewing process due to limited supply → Unconscious bias amongst male hiring managers still influences hiring decision-making
Outcomes / benefits	<ul style="list-style-type: none"> → Increased gender equality / diversity of recruitment process inputs and decision-makers drives better gender-balance amongst new hires
Measurement of impact / ROI	<ul style="list-style-type: none"> → Improved gender balance of new hire population → Improved gender balance within teams over time → Increased gender diversity through whole talent pipeline over time

Implementing your strategy

We are now at stage 3 of the change process ('Implementation').

Question to ask: "How can we start (or keep) moving?"

A coherent strategy facilitates stronger, faster gender equality progress and outcomes, because it will help to ensure effort and investment are directed towards the right areas in the right order. The execution of the strategy requires a separate project or implementation plan for each objective.

However, not every objective will (or should) be tackled concurrently. A typical strategic timeframe will be three years; actions and initiatives will need to be carefully distributed over the relevant timeframe, to ensure cost-effective delivery of optimal outcomes.

Prioritisation and Scheduling

The priority, sequencing and timing of initiatives should take account of:

- Potential impact and likely return on investment
- Level of stakeholder support
- Timing of and synergies with other HR or change initiatives
- Business loading and priorities
- Complexity of work and implementation challenges / barriers
- Availability of resources
- Regulatory and other external drivers

Implementation Planning

Develop an implementation / project / action plan for each focus and result area, which details:

- Workstreams
- Approaches and methodologies
- Outcomes and deliverables
- Roles and responsibilities
- Resources required
- Timeframes and milestones

Communication planning

A communications plan should include:

- Responsibility for communications
- Target audiences
- Audience needs / expectations
- Key Messages
- Timeframes / scheduling / frequency
- Media options

Communication objectives

Communications to support the release or refinement of gender strategy should:

- **Explain** – articulate the 'what', 'why' and (in outline) 'how' of the gender strategy
- **Educate** – equip stakeholders with the knowledge and confidence they need to articulate and promote the gender strategy
- **Engage** – motivate and inspire stakeholders to actively contribute to the gender equality journey and convey a sense of ownership for successful outcomes at all levels

Section 6: Continuous improvement

We are now at stage 4 of the change process ('Review').

Question to ask: "How are we travelling?"

Reviewing your strategy and action plans

In effect, this stage flows back to the start of the change process ('Analysis'), thus creating a cycle of continuous improvement.

Evaluation

A strategy should describe how and when evaluation will occur. Ongoing evaluation involves showing what has (or has not) been achieved to date. This kind of evaluation can be undertaken at regular intervals as a form of progress audit.

The final evaluation involves assessing whether or not strategic objectives have been achieved, using whatever measures of organisational performance were set out in the strategy – and additional ones if appropriate (e.g. if technology has enabled better or more extensive data-gathering and reporting).

Ongoing Evaluation

The strategy document should set out the process and frequency for monitoring organisational progress or performance in relation to each objective. Questions to ask at regular intervals include:

- How is the organisation progressing in relation to each of the objectives within the gender strategy?
- Is there sufficient data to reliably assess progress / measure outcomes?
- Where lack of progress or issues are identified, how can this information be used to address these (remediation)
- What activities or actions should be stopped / started / changed?
- Does the strategy or individual objectives need to be adjusted in light of experience to date, and what are the implications of this?

Final Evaluation

This occurs after the deadline for achievement of each objective within the strategy. Questions to ask include:

- Has the organisation achieved the respective objective(s) within the gender strategy?
- If not, why not – and what is the learning from each success, partial success or failure?
- How should the next gender strategy be adapted to exploit the previous learning, and to maximise the chances of success

It may also be helpful to cross-reference gender strategy outcomes with performance in:

- Compliance reporting (GEIs and minimum standards)
- EOCGE submission
- Benchmarks report(s)

Another useful set of data may come from specific comparisons with other organisations or inputs from gender advocacy bodies:

Organisational sources

- EOCGE cited organisations
- Organisations represented at the Male Champions of Change forum
- Diversity Council Australia member organisations
- Industry bodies and special interest groups
- Professional and trade associations
- Winners of equality / diversity awards (e.g. AHRI, Pride In Diversity)
- Women On Boards

Individual

- Members of Male Champions of Change forum
- Members of Chief Executive Women

Note additional sections to be included:

- sharing your experience (question to ask “Who else might benefit from our learning?”)
- case studies

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