

# The Gender Equality Principles Assessment

GLOBAL VALUE tool showcase



This project has received funding from the European Union's Seventh Framework Programme for research, technological development and demonstration under grant agreement no. 613295

## Introduction

# The GLOBAL VALUE tool showcase series

### **GLOBAL VALUE tool showcases: your guides to using tools**

Understanding a company's impact on sustainable development, and finding ways to manage it best, is not an easy task. With so many tools available, choosing one to invest time in is even more difficult. GLOBAL VALUE tool showcases will make this task easier.

We selected and tested 15 leading tools in different categories to help understand how each of them can help you achieve your assessment goals. Our tool showcases are meant to support you in deciding which tool best fits your company's needs. The tools were tested in collaboration with multinational companies from different sectors to give you practical tips on how to get the most from using each of the showcased tools.

### **Tools for managing impact on the Sustainable Development Goals**

The Sustainable Development Goals (SDGs) are the north star for global development for the next 15 years. Adopted by the United Nations in September 2015, these Goals have been developed in extensive consultation with the business community. For companies across the globe, the SDGs are both a challenge and an opportunity to serve global populations in a manner that is sustainable in the long-term. Each tested tool has also been screened for how many and which SDGs it may help companies tackle.

Find more tool showcases on the [GLOBAL VALUE Toolkit](#).

### **Tool selection**

The tool showcases feature [15 tools](#) that were selected from over 200 tools collected during three years of research in the context of the [GLOBAL VALUE project](#). These tools were shortlisted through an iterative consultation with GLOBAL VALUE consortium experts, who evaluated the strengths and weaknesses, feasibility and usability, methodology and added value of different tools in order to narrow down the list of tools to 15 for testing in an actual company setting.

There are very few gender focused assessment tools. In the majority of cases, gender issues are addressed within human rights, or overall sustainability assessments. The Gender Equality Principles (GEP) Assessment was selected for testing as one of the rare comprehensive gender focused sustainability assessments available to business.

### **Tool testing process**

The tool showcases are based on the experiences of three GLOBAL VALUE tool testers, who have implemented these tools in collaboration with [three multinational companies](#). The tools were tested with a specific focus on their operations in developing countries, in order to understand how each of them can help companies measure and manage their impacts on global sustainable development. The tool testing assessed each tool's feasibility and usability, user friendliness, content and context, methodology, data required and results provided.

This showcase will guide you through the main benefits and limitations, ease of use, tool adaptability to different geographical and company contexts, scope of value chain and SDG coverage, methodology for assessing impact, and the usefulness of output or results that the tool provides.

# An introduction to the Gender Equality Principles Assessment

The Gender Equality Principles (GEP) Assessment is a diagnostic self-assessment tool, focusing on gender equality management and performance of an organisation. It aims to help companies assess how well **gender equity principles are integrated** into workplace practices and company operations.

Expect questions about company policies and performance that relate to 7 gender equality principles: 1) Employment and Compensation; 2) Work-Life Balance and Career Development; 3) Health, Safety, and Freedom from Violence; 4) Management and Governance; 5) Business, Supply Chain, and Marketing Practices; 6) Civic and Community Engagement; 7) Leadership, Transparency, and Accountability.

The GEP Assessment is an easy to use, quick, comprehensive and targeted diagnostic assessment that can help companies **identify areas of strength and weakness** in their policies and practices related to ensuring gender equality in their organisations and the supply chain. The tool is one of the few available ones, that target solely gender equality issues in business.

## At a glance

Web: <http://www.genderprinciples.org/index.php?p=21>

Developer: Gender Equality Principles Initiative

The Gender Equality Principles Initiative is a public-private initiative formed by the San Francisco Department on the Status of Women in the United States, a responsible investment firm, Calvert, and a women rights civil society organization, Verité. The GEP Assessment was developed between 2008-2010 with the aim to provide practical guidance to companies for integrating gender equality principles in their operations. The GEP Assessment, and other tools developed by the Initiative, have been created with input from companies, NGOs, experts in gender, human rights and labour.

Use the GEP Assessment when you want to:

- **assess strengths and weaknesses** in a company's integration of gender equality principles
- **identify opportunities for improvement** in workplace practices and strengthen gender-related policies and practices

## Features

## What you need to know about the GEP Assessment

This section gives you an overview of the key features of the GEP Assessment. All important information that can help you decide on whether this is the tool for your needs is presented in a condensed format in the table below. For more elaborate information on the [icons](#) and to explore other tools please visit the [GLOBAL VALUE tool navigator](#).

Purpose	Scope	Output	Requirements	Access
 <p>The main purpose of the tool is <b>to help companies learn</b> more about gender equality principles and how to best integrate them into their organization's management.</p>	 <p>The tool focuses on the <b>whole value chain</b>: upstream and downstream. The assessment focuses on company own operations, supply chain, as well as product development and marketing, albeit to a lesser extent.</p>	 <p>Assessment results are presented as pie charts, indicating strengths and weaknesses for each gender equality principle. <b>Benchmarking is</b> possible, but not is limited to a small number of comparable companies in the database.</p>	 <p>Users can implement the tool <b>on their own in a few hours</b>, no external consultant support, nor stakeholder engagement is required.</p>	 <p>The tool is <b>free</b> to use and is available online after registration. Assessment is <b>anonymous</b>.</p>

### What did tool testers say - Overall experience

The GEP Assessment tool is designed to help organizations run internal assessments on their compliance with gender equality principles, which they can use to identify areas of strengths and areas of improvement within their workplace and organization. However, the tool does not measure the impact a company has on gender equality, but rather management and performance.

The tool is comprehensive in relation to gender issues, easy to understand and use, and offers the option of using linked accounts. As the tool operates on a policy level, it is mostly suitable for companies operating across countries or vertically integrated companies. However, the tool was primarily designed for US based companies and it can not be modified for different locations or industries where gender equality issues may vary from the tool's context.

### Want to explore other tools?

[GLOBAL VALUE tool navigator](#) features are over 200 tools all screened for the same features as the GEP Assessment above.

## Benefits

## Key benefits and added value of the GEP Assessment

### Key benefits you can expect

- **Comprehensive gender equality coverage**

The tool is very comprehensive with regards to gender equality issues. It addresses business operations, product development, marketing, and supply chain management. The tool assesses gender equality in depth and translates the relevant issues into a business context.

- **Quick diagnostics**

A company can complete the GEP Assessment in a few hours. It can be implemented based on the user's knowledge of the company without extensive data collection. It is, therefore, possible to learn and identify very quickly which areas of company operations deserve more attention regarding gender equality.

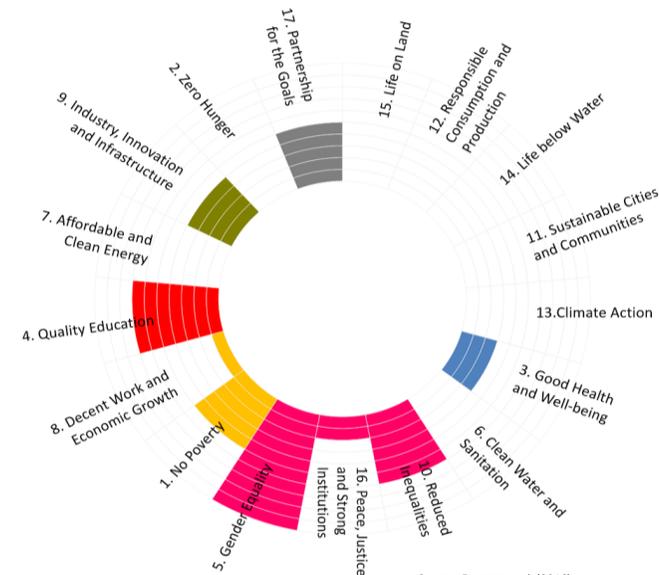
- **Best practice inspiration**

The GEP Assessment includes a number of resources and best practice examples from other companies that can help a user identify possible actions to implement within their own organisation for improving gender equality.

Learn more about the SDGs and what they mean for your business on the [GLOBAL VALUE Toolkit](#).

### Sustainable Development Goal coverage

The graph below shows the extent to which GEP Assessment addresses the different issues covered by the [Sustainable Development Goals \(SDGs\)](#). Under each SDG, there are a number of different targets that are related to the individual goal. Some SDGs have more targets, while others have fewer. During our testing, we screened the tool to determine how many of the targets the tool covers under each SDG. The graph below is normalised and can tell you not only which SDGs the tool addresses, but also to what extent. The higher the SDG's coloured column, the more targets the tool addresses (read more about the testing process [here](#)).



Source: Farsang et.al. (2016)

## How to

## Implementation steps

### **STEP 1: Deciding on the scope of the assessment**

As a first step, you will be asked to register as a user of the GEP Assessment, indicating your primary industry sector and size. This will determine to which benchmarking group your results will be compared. Registration is not mandatory for accessing the assessment. However, it will allow you to make use of all possible features, e.g. storing the assessment results for comparison in further years, as well as linking in other colleagues to collaborate on the same assessment.

Since the GEP is a diagnostic tool, the choice of a business unit to be assessed is not as important as in some other questionnaire based management system assessment tools. The majority of the assessment can be implemented focusing on company-wide policies and practices. However, the assessment allows you to select the principles which you would like to assess your organisation against. You can choose either one, a few, or all GEP principles at this stage.

### **STEP 2: Answer as many questions as you can from your knowledge**

The GEP Assessment is structured according to 7 gender equality principles, each deconstructed into a total of 21 elements, which in turn are deconstructed into a total of 102 indicators. The assessment allows you to select the principles or elements you want to focus on and does not require you to answer each and every indicator question. Each indicator will focus on a specific gender equality related policy within an area of your business operations. You will have to choose an answer option that would best correspond to the level of this specific policy implementation at your organisation. If you choose to complete the whole assessment, then the indicators will investigate your policies and practices from the factory floor to the boardroom.

### **STEP 3: run a second round of refining your answers**

With the right knowledge about a company at hand, a user should be able to complete the diagnostic assessment in one round. The tool also suggests running the assessment in a focus group to obtain consolidated company knowledge. However, if you wish to dig deeper into some issues, a second round of refining answers to some of the questions you did not have knowledge of, may be required.

### **STEP 4: analyse areas of strength and weakness**

If you ran the assessment as a registered user, you will be able to save it and obtain visual graphs depicting the extent to which each of the policies required by the Gender Equality Principles initiative are implemented in your organisation. Results are presented in the form of a pie chart, showing how many indicators users fulfilled on a basic level (1 to 3) and advanced level (4 to 5). You will also have an option to benchmark these results against other companies in the database. However, the database of assessments you can benchmark to is limited and little information is provided about the corresponding benchmarking group, which makes very meaningful benchmarking difficult.

### **STEP 5: Prioritise areas for improvement and define actions**

The GEP Assessment provides case studies, academic articles, and best practice examples from other companies to inspire your actions for improving gender equality in your organisation. Review the areas where your implementation levels are low and prioritise the ones to be focused on. The assessment also suggests to define the action plan, including measurable targets. However, further guidance on how this is to be done is lacking. As a registered user, you will be able to save the results of your assessment and return after a period of time to review progress made by retaking the assessment and comparing it against baseline results.

# How to

# Implementation steps (cont.)

## Illustrations for Step 2-3:

The GEP Assessment deconstructs gender equality issues in an organization into 7 principles and their elements, covering company policies and practices from the factory floor to the way that decisions are made in the boardroom. In the illustration below, you can see the deconstruction in more detail. The right hand side also shows the elements that e.g. the Employment and Compensation principles is deconstructed into.

**Assess Your Workplace**

<p><b>Get started</b></p> <p><b>Employment and Compensation - Completed</b> Eliminating discrimination in recruitment, hiring, pay and promotion</p> <p><b>Work-Life Balance and Career Development - Completed</b> Enabling work-life balance and supporting educational, career, and vocational goals</p> <p><b>Health, Safety, and Freedom from Violence - Completed</b> Securing the health, safety, and well-being of women workers.</p> <p><b>Management and Governance - Completed</b> Proactive efforts to recruit women; equitable participation in management.</p> <p><b>Business, Supply Chain, and Marketing Practices - Completed</b> Maintaining ethical standards and prohibiting exploitation</p> <p><b>Civic and Community Engagement - Completed</b> Promoting participation in civic life and encouraging the participation of women</p> <p><b>Leadership, Transparency, and Accountability - Completed</b> Expressing a public commitment to these Principles throughout the organization</p>	<p><b>Employment and Compensation</b></p> <p>Organizations will take concrete steps to attain gender equality by adopting and implementing employment policies and practices that eliminate gender discrimination in areas such as recruitment, hiring, pay, and promotion.</p> <p><b>Key elements</b></p> <ul style="list-style-type: none"> <li>a. Wages, Benefits &amp; Pay Equity <span style="float: right;">Assessment <input type="checkbox"/> Begun <input checked="" type="checkbox"/> Finalized</span></li> <li>b. Discrimination <span style="float: right;">Assessment <input type="checkbox"/> Begun <input checked="" type="checkbox"/> Finalized</span></li> <li>c. Recruitment &amp; Hiring <span style="float: right;">Assessment <input type="checkbox"/> Begun <input checked="" type="checkbox"/> Finalized</span></li> <li>d. Non-Salaried Employees <span style="float: right;">Assessment <input type="checkbox"/> Begun <input checked="" type="checkbox"/> Finalized</span></li> </ul>
---	---

Once you click on the "Assessment" button of each individual element, it will lead you to the indicators (questions) that assess how well your organization has implemented that specific element of the gender equality principles. The assessment of each element will provide you with more information about the issue at hand through the "Learn more" function, and showcase some of the tailored learning resources available.

Each indicator should be answered based on your (or your focus group's) opinion about the extent to which the gender equality indicator has been implemented on a scale of 1 ("No policy in place") to ("Policy and implementation plan in place, widely accepted and utilized").

Principle 1 Employment and Compensation

Key Element A **Wages, Benefits & Pay Equity**

[Learn more](#)

There are 6 indicators for this element.

Indicator 1

Pay the legally mandated minimum wage and benefits for all staff including apprentices, casual workers/trainees, piece rate workers, and employees on probationary status.

Implementation level: 1 2 3 4 5 Does not apply

Action/Notes

[Assess Your Workplace](#)

[About implementation levels](#)

[Next Steps](#)

**Top resources for this Principle**

[Show all for this Principle](#)

**Unitive - Bias Blocking Hiring Software**

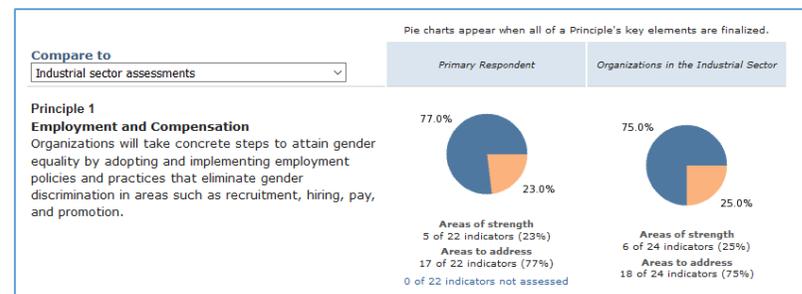
Unitive is a software that removes unconscious bias at every step of the hiring process from job descriptions to interview questions to empower companies of any [More...]

[Web](#), Added 10/11/2016

**Gender Equality Checklist for Exec. Managers**

## Illustration for Step 4-5:

Once you have completed the assessment for all or your selected elements, you will be able to review your assessment results, indicating the areas of strength and areas in need for improvement. Results can be compared to the averages of industrial businesses or other mid-sized organisations.



## Suitability

# Tool testing insights: GEP Assessment for MNCs

### **GEP Assessment for MNCs**

The GEP Assessment is a tool for businesses of all sizes wishing to assess their compliance with gender equality principles in their workplace and operations, aiming to help them identify their strengths and weaknesses. Given that it only works on a diagnostic level, with a majority of indicators being possible to answer based on the user's knowledge, it is possible to run the assessment for multinational companies operating across continents, and with multiple business units, without major challenges.

The gender equality topics addressed by the assessment cover many of the issues that are also important in developing countries (e.g. violence in the workplace against women). However, the tool has been developed in the United States and is primarily targeted to companies operating in developed countries. As a result, it may be slightly biased in its benchmarking of the assessment results. Furthermore, the resources the tool provides as best practice examples, or case studies, may also be of less use for multinational companies operating in developing countries.

Gender focused assessment tools are rare, meaning the GEP remains one of the most comprehensive gender equality targeted tools. It does have a value as a diagnostic assessment for multinationals, but should be coupled with human rights compliance assessments for a fully rounded view of gender equality issues that could be present in an organization operating in developing countries.

### **Ease of use**

The information needed to implement the tool are easy to obtain. The assessment mostly requires information about gender/human rights based policies and the level of their implementation that can be estimated by the user. However, allowing for arbitrary user judgements have implications for analysing the final assessment outcome.

Usually, an organization's assessment requires a few hours of staff time to learn to use and implement. Users do not need to have a lot of technical knowledge to run the tool. However, users do need a basic understanding of the organization's management system and existence of policies that relate to the workplace and supply chain management.

As a diagnostic learning tool, it provides a lot of guidance and links to external supporting materials that help the user learn about gender equality issues and find ways to better manage them in the given organisation. The tool includes a FAQ section; an explanation on how to use the implementation evaluation scale; a resource section with case studies, best practices, and business case material; and a "learn more" section that covers key elements of the Principles the tool is based on. The developers of the tool regularly run Gender Equality Principles Challenges, in order to collect the most inspiring case studies and practices for implementing gender equality in organisations. The results and selected practices are then made available through the tool's website. The most recent best practices include initiatives by organisations, such as PwC, Pinterest, McKinsey, and Glassdoor, obtained through the 2017 competition.

## Review

# The GEP Assessment approach to measuring and managing impact

### Managing for global value

All the tools GLOBAL VALUE tested exhibit a different approach to managing a company's impact on sustainable development. Tested approaches include tools that assess a company's management system, monetize sustainability impacts or map impacts and build strategies for mitigating negative impacts and enhancing positive impacts.

In order to capture these differences, and what each of these approaches brings to a company wanting to measure and manage its impacts, each of the tools tested were evaluated against a set of criteria developed by the GLOBAL VALUE consortium. Find out more about the criteria we used [here](#). An online [Expert Crowd](#) of more than 260 experts from a variety of organisations and stakeholder groups globally has also been involved in developing the criteria to ensure that the most important concerns of science, businesses, civil society and policymakers are reflected.

This section will provide insights into the underlying assumptions of how GEP Assessment evaluates the impact of a company using the tool, and the usefulness of the results that the GEP Assessment provides for managing business impacts on sustainable development.

Learn more about how to use tools for managing your impact on the SDGs on the [GLOBAL VALUE toolkit](#) !

### GEP Assessment approach

The GEP Assessment tool focuses on the ways the company is managed, in order to determine whether it positively contributes to gender equality in its own organization and a wider network of supply chain partners. The tool focuses on assessing processes and performance levels. It does not make an attempt at assessing the impact a company has on gender equality. The logic behind the GEP tool is that if an organization has the right policies in place, and monitors outcomes across business processes, then it will have positive contribution to gender equality.

The GEP Assessment makes use of qualitative user knowledge, and, to an extent, qualitative data obtained from human resources departments within the organisation. The tool also suggests conducting a small Focus Group Discussion for completing the assessment. However, GLOBAL VALUE tool testers found it possible to run the assessment without this being necessary. Some questions and indicators of the tool leave leeway for answers based on the user's own judgment, which makes the results less robust. However, given the diagnostic and learning purpose of the tool, this is not a major drawback.

### GEP Assessment output

Assessment results indicate the strengths and weaknesses in the implementation of gender equality principles across the organisation. The prioritisation of areas to improve in is up to the user. Even though the tool offers a benchmarking option of assessment results, the feature is less useful due to the current low number of companies in the database to benchmark against. The GEP is not an in-depth assessment tool. Therefore, companies should consider the assessment results as a starting point for identifying areas where improvement is needed.

## Resources

## Further resources

- GEP Initiative: <http://www.genderprinciples.org/index.php?p=21>
- GEP Assessment: <http://www.genderprinciples.org/assessment.php>
- GEP Challenge 2017 Model Practices: <http://genderprinciples.org/index.php?p=108>
- Sustainable Development Goals (SDGs): <https://sustainabledevelopment.un.org>
- GLOBAL VALUE Project: [www.global-value.eu](http://www.global-value.eu)
- GLOBAL VALUE Toolkit: [www.global-value.eu/toolkit](http://www.global-value.eu/toolkit)
- GLOBAL VALUE Tool navigator: [www.global-value.eu/navigator](http://www.global-value.eu/navigator)
- GLOBAL VALUE Expert Crowd: [www.global-value.eu/toolkit/expert\\_crowd](http://www.global-value.eu/toolkit/expert_crowd)
- Farsang, A.; Reisch, L.A.; Temmes, A.; Wiman, A.; Munrat, S.H.A.; Jenkins., A.; Schönherr, N.; Martinuzzi, A. (2016), *GLOBAL VALUE Deliverable 4.03. Final Comparative Assessment Report.*



Coordinated by:



In collaboration with:



## Authors

*Adele Wiman, Armi Temmes, Andrea Farsang, Norma Schönherr, Lucia Reisch*

Institute for Managing Sustainability  
Vienna University of Economics and  
Business

[www.sustainability.eu](http://www.sustainability.eu)

## Impressum & Disclaimer

GLOBAL VALUE is co-funded by the European Union Seventh Framework Programme under grant agreement no 613295. Sole responsibility for the project lies with the participating organisations. The European Commission is not responsible for the use that may be made of any material arising from this project.