

How-to Guide

for Gender Gap Assessments in Companies



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Introduction

EAFIT University, as a member of the Business Alliance for Gender Equity in Antioquia, Colombia, has been researching gender challenges and inequalities in the Antioquia business sector as part of the Business Alliance's knowledge management. This effort includes activities that document, analyze and consolidate experiences of Antioquia's business sector in promoting gender equality and equity, as well as women's leadership, in the private sector.

Under this project, EAFIT University constructed two methodological guides that serve as support for companies seeking to start down this path of gender equity. The first one, developed in this document, is a how-to guide to conduct organizational assessments regarding gender gaps. The second is a how-to guide to design business policies for gender equity. Of note, an important first step for any company is carrying out an assessment on gender gaps within the organization. This first assessment will serve as a fundamental and important step to later design gender equity policies.

This project encompasses the knowledge and experiences gained by EAFIT

University during its leadership of different technical and methodological processes in policy design. Likewise, this guide is intended to supplement the range of existing tools in the country that can be used to conduct gender equity assessments. This tool can be used as a baseline to determine the situation of women, and other minorities, in organizations. Managers can use the baseline data to make decisions during strategic planning to eliminate and mitigate gaps and unconscious biases.

Several international and national tools exist that can supplement this guide. These tools include: the Aequales Par Ranking, the UN Women WEPS tool, the Equipares seal, the Gender Parity Initiative, and the ANDI Gender Equality Survey, among others. Any can be used to conduct a gender gap assessment in organizations.

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Methodology

The EAFIT University team began elaborating this study with a detailed review of existing tools that can be used to assess public and private institutions, both nationally and internationally. This review helped determine which general elements must be included in this type of assessment, as well as those which should be tailored to the sector. For the purposes of this guide, the research team prioritized categories used in the private sector and designed some instruments for a qualitative and quantitative analysis including company documents, manuals, databases, indicators and goals, as well as measurement of perceptions and needs.

The research team also carried out five virtual interviews with strategic actors from five different companies with experience in preparing gender gap assessments and drafting gender equity policies. This allowed the team to gather information for the guides while considering lessons learned and elements highlighted by experts on the topic. During this process, the research team spoke with a representative of Insuco consulting company, the coordinator of the Colombia Gender Parity Initiative, members of Aequales, the electricity sector association COCIER and the Colombian Oil Pipeline Foundation, which has a project known as “footprints for equity”.

Based on this information, the research team designed first drafts of the guides,

with step-by-step instructions to carry out the assessments and policies. The purpose was to generate input for the steps that should be performed that would be validated by focus groups that included company representatives. Four in-person validation workshops were carried out with 33 companies located in the Metropolitan Area, representing different sizes and sectors. This enabled the research team to structure diverse focus groups that included large, medium, small, and micro-enterprises. Furthermore, company representatives from companies operating in traditionally female- and male-dominated sectors participated. These focus group sessions were held on the following dates:

- August 26, 2022: Chamber of Commerce Central Headquarters at Calle 53 (Maracaibo) No. 45 – 77, Epifanio Mejía Auditorium
- August 29, 2022: Poblado Business Center, Chamber of Commerce, Carrera 43A No. 16 sur 245, Room 201
- August 30, 2022: Aburrá Norte Business Center (Bello), Av. 38 No. 51 – 105, Main Auditorium
- August 31, 2022: Proantioquia.

The findings of these focus groups are included in this guide. Participants determined that the proposed guide topics were relevant within the framework of



their organizational contexts. Moreover, they deemed them important instruments to present to their respective boards of directors or organizations' management teams, given their experiences with gender gaps and discrimination. Thus, the comments shared in the focus groups and company's experiences were both relevant to and useful in the elaboration of the final guide documents.

The companies underscored the following important issues during these focus groups:

- During the focus group conversations, companies indicated that the proposed guides needed to be adjusted to the needs, requirements and capacities of the companies. All participants highlighted the relevance of the guides within their organizational contexts.
- Companies suggested a need for clear and precise steps to perform each of the highlighted phases. They also pointed out that these assessments should include a dynamic component and that the probabilities of success depended upon the commitment of the company's senior managers. Several of the mid-level participants pointed out that these types of assessments are valuable because they provide evidence on the importance of presenting these types of assessment and policy tools to their boards of directors or senior management teams.
- All companies revealed gender gaps in their contexts that varied according to their company size and sector. However, the common denominator for everyone was the importance of attention and actions from the company's senior management. Some of the participants shared that senior managers still resist addressing the issue. They felt that the main challenges included identifying how senior managers can be convinced of gender equity, or how to start gender equity actions regardless of that senior management support.
- The participants stated it was paramount to address the issues of gender-based violence and sexual harassment at work. Evidence shared that for many companies this topic is complex, as there are few to no mechanisms, protections and knowledge regarding the country's legal provisions regulating this matter.
- Many organizations suggested that company Coexistence Committees and Gender Equity Committees should be the same entity, while

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others pointed out the inconvenience of unifying these groups. If separate, the Coexistence Committee should investigate and respond to conduct that goes against internal regulations, and its members should not belong to the Gender Equity Committee. The latter, in turn, would serve as broader body to work on gender equity issues within the company.

- It is imperative to build guides that support strategies to identify alternative solutions: selection and recruitment protocols; strategies for personal, work and family life balance; protocols to prevent and respond to gender-based violence; access protocols; and training protocols, among others.
- Gender equity policies must also address considerations from outside the companies themselves. In order to

achieve structural changes on these issues, companies must incorporate outside considerations within their internal assessments and policies, such as national legislation or practices by other members of the value chain.

- Companies also see the need to involve their supplier networks in gender equity training, education and awareness processes. They must incorporate certain strategies into their policies to address gender equity along the value chain.
- In traditionally female-dominated sectors, such as the textile industry, company representatives identified that the existence of more women within the organization did not necessarily translate into greater gender equity within the company. This indicates that special strategies and actions would be appropriate for these sectors.

The Importance of Assessments to Eliminate Gender Gaps

Societies have been ordered historically based on hierarchical criteria, in which age, ethnic origin and gender, among other characteristics, have established power relations rooting human behavior and relationships. In recent decades there has been significant progress made in gender equality and equity promoted by feminist movements that have sought to highlight inequalities and propose social and cultural transformations. Schools, universities, companies and public institutions have been increasing the active participation of women within their spheres, both in terms of numbers and position in decision-making roles.

Despite these important changes, scenarios and manifestations of inequality, exclusion and inequity persist. This persistence was verified by the companies that participated in the focus groups, as evidenced by their stories of existing gender gaps within their organizations.

Cultural norms maintain obstacles for women's full access to social, professional and labor opportunities. This existence of unequal power has been transferred to public and private institutions and organizations that "are permeated by the societal values, schemes, and behaviors in force, including perceptions of what is feminine and masculine" (Hernández and González, 2019, p. 2). The foregoing is expressed through unequal access and control over material and immaterial

resources, such as economic autonomy; decision-making power; participation in science, technology and innovation sectors; and the persistence of traditional care responsibilities and roles, among others.

Thus, the assumptions that underlie social dynamics extend to company operations. As strategic social actors, companies are called upon to take a position against conditions of inequality. One way to start this venture is through self-assessment regarding the presence of inequalities, gaps, stereotypes, and unconscious biases within said companies (Díaz and Gutiérrez, 2014). In other words, the primary manifestation of commitment with respect to gender equity is to review internal situations that can perpetuate these inequalities.

That said, a company's highest authority – and/or board of directors – should issue a statement declaring its commitment to gender equality. With the commitment of the company's highest authority, any necessary changes should be supported.

The first step on the path of gender equity is to undertake the assessment process. The inputs from this assessment will help identify the conditions, needs and current experiences of women and men at the company (Díaz and Gutierrez, 2014). Without this initial mapping, the implementation and assessment of policies and action plans for gender equity

will lack adequate planning. According to the National Institute for Women [INAMU *for its acronym in Spanish*] (2017), an institutional assessment on gender gaps is the best tool to discover particular needs and perform a periodic evaluation of the impact of actions being implemented within a company.

With this in mind, the main objective of the assessment is to reveal the gaps, conditions and scenarios of discrimination, regarding gender, that are present in an organization (INAMU, 2017). Based on this

general objective, specific purposes of the assessment can be identified, such as: (1) pinpointing the core elements to elaborate or update a gender equity policy; (2) setting informed and realistic goals for gender equality in the company; (3) prioritizing actions, strategies and projects to eliminate gender gaps; (4) providing a baseline to measure progress, policies and strategies; and, (5) contributing to the improvement of the organizational climate through training, participation and consideration of perceptions regarding gender equality and equity within the company.

Step 1: Team

The first step of the gender gap assessment is to form a team or designate the gender equality committee to lead, manage and plan the process. This team or committee will not only be vital for carrying out the assessment, but also for formulating and implementing the resulting policies and actions. The team will be set up to lead dialogue and communications across all company levels, thus ensuring the existence of generalized consensus for decision-making (ONUW and UNODC, 2019).

As noted in many assessment manuals and tools throughout the world, this committee must have the support of senior management, that is, the commitment of the Company President and/or CEO. This measure is paramount because, from the outset, it indicates the company's commitment to eliminating gender gaps. This implies allocating certain human resources from key company areas to support this initiative (Aequales, 2021; Fainstain and Perrotta, 2011). Thus, this committee must be created by a managerial decision.

The second consideration is that the team or committee must reflect the diversity that exists within the organization (Aequales, 2021). The team must be comprised by equal numbers of men and women, representing the diverse community present in the company

or operating environment. This will enable a more dynamic approach. This diversity must also extend to functional areas. Namely, the team or committee should include the participation of representatives from the following areas: Human Resources, Quality Management, advisors and employee representatives (Fainstain and Perrotta, 2011), at a minimum. This inclusive approach will facilitate information-gathering activities and enable the participation of all company areas in the assessment.

Another matter relevant to the team is to ensure that its members possess experience in and knowledge of gender equity, diversity, inclusion or human rights issues (Fundación Mujeres, 2008). This expertise will help ensure that the assessment and the future policy or action plan are based on solid information. A fourth issue relates to the creation of a systematic work schedule, accompanied by periodic deliverables (Fainstain and Perrotta, 2011). The team should define periodic meetings to follow-up on the assessment process, decision points and strategies. These meetings should

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be documented through minutes, procedures, interviews, etc.

In sum, the consolidated committee or team that will perform the gender gap assessment within the company should be a group committed to transforming the organization. Moreover, it should have sufficient authority and resources to promote gender equity. This implies both the capacity and willingness to design corrective strategies based on the assessment results. The team should lead the following:

- Prepare and structure the gender gap assessment.
- Access and analyze all quantitative and qualitative information necessary for

each line of assessment, ensuring the required confidentiality.

- Design and draft a Gender Equality Policy that considers the most important findings from the assessment.
- Design and implement an Action Plan for the Gender Equality Policy, including implementation and monitoring.
- Generate information of interest to the company, its employees and management committee related to gender equity.
- Carry out, promote and accompany an awareness-raising process on gender equity issues.

Step 2: Education and Training in Gender Equity and Assessment Preparation

The next step is to create a training and awareness-raising process about the importance of these issues for the company. The purpose of this is to build and strengthen the change process, as well as garner commitment from senior managers and leaders. The company should have started the awareness-raising process during the assessment phase, to promote greater commitment and understanding among managers and operational teams (Aequales, 2021; Díaz and Gutiérrez, 2014).

The awareness-raising process can be started by mapping specific company areas that have knowledge deficits. The team should define what sessions will be held and in what timeframe. They should also decide who will lead these efforts, who will facilitate, session objectives, number of participants, methodologies, and assessment tools, among others. Themes should be defined based on the interests of the teams and areas, in addition to difficulties experienced. The team should identify allies who can participate in these awareness-raising sessions and serve as topic experts. Finally, these sessions should be evaluated, systematized and recorded, eventually serving as important inputs for the assessment (ANDI, 2020). The following activities can be incorporated in this awareness-raising process:

- The first step to engage with colleagues and raise awareness within the company is to contextualize the problem. The team should present gaps that persist worldwide based on local and international data and measurements. The next step is to carry out the assessment, which will serve as a baseline to discover where the company also faces gender gaps (ANDI, 2020).

The assessment should present the most common labor data and indicators, disaggregated by sex (male/female). These include: time dedicated to care activities, gender-based violence and sexual harassment, leadership gaps, women participation indicators in terms of labor markets and wage gaps. The committee or team can collect this data or contract subject-matter experts, whether from public, private or academic entities.

- Secondly, even if gender equity is assumed to be an ethically and socially relevant issue within the national and international agendas, the process of raising awareness should also include the significant and measurable benefits for companies (Ramírez, 2017). Thus, part of these awareness-raising sessions should include research

showing how companies that close gender gaps achieve better financial ratios, a healthier work environment, a higher standing in the business sector, and improved opportunities for innovation.

According to the McKinsey Global Institute (2015), achieving gender equity would contribute close to 28 trillion dollars to global GDP. Likewise, studies have shown that if a company has at least 30% women in leadership positions, profitability could increase by 15% (Noland et al., 2016). Companies with higher equity rates between men and women are up to six times more innovative (Accenture, 2019). These and many more data points can be pulled from the international context to strengthen the credibility and commitment of companies and decision-makers.

Raising awareness regarding the social relevance of gender equity

Raising awareness regarding the financial, economic and reputational benefits of closing gender gaps

Representatives in the focus group sessions identified that the awareness-raising process might not be sufficient or significant for small and medium enterprises (SMEs). Given SMEs do not often have large numbers of employees, this process may not be as important. In addition, due to their sizes, gender inequality dynamics extend beyond their own companies to those in their value chain. Therefore, SME companies stated the need to involve their supplier networks in training, education and awareness-raising processes. The participants also suggested incorporating strategies within their policies so that gender equity was incorporated in the entire value chain.

Step 3: Conceptual Framework

The third step in the assessment process requires defining basic concepts that allow for analysis with a gender perspective. This section suggests an initial conceptual structure that is fundamental to addressing gender equity issues. Companies may refer to this conceptual framework to then develop their own internal frameworks. This section also lists some definitions that will be used throughout the document.

Gender

The concept of gender refers to the identity of human relationships and individual development. Thus, it differs from sex, which refers to the biological, bodily and hormonal structure of a human being. In concrete terms, gender has to do with the sociocultural rules, practices, customs and constructions that define and assign certain social roles to women and men. According to Ramírez (2017), gender is a “dichotomizing mechanism, assigning different and hierarchical places and functions between men and women, thus maintaining and reproducing inequalities in the workplace” (2017, p. 8). To this extent, knowing, defining and reflecting on this concept enables us to understand how identities and relationships between men and women are configured in private and public settings.

In social organization based on gender, characteristics are attributed and

normalized behaviors categorized as “feminine” and “masculine”. This sets an objective and subjective behavior to people based on their sex, affecting the human development process, the organization of work and even sexuality. UN Women, the Presidential Council for Women’s Equality (CPEM *for its acronym in Spanish*) and ECLAC (2021) have stated that gender is characterized as a relational concept that goes beyond the individual and affects human relationships. It is hierarchical insofar as it designates power relations. And it is temporary and contextual, to the extent that it changes over time, depending on the specificities of a region and culture.

Gender Gaps

The assessment process includes the concept of gender gaps. This concept is central and must be kept at the forefront throughout the assessment process. Gender gaps refer to situations and scenarios of statistically significant inequality generated between men and women due to gender. Indicators can be used to express gender gaps.

According to Fainstain and Perrotta (2011), gender gaps are measurements that represent disparities between men and women that affect their possibilities to participate, access resources and exercise rights. To this extent, gender gaps can be the result of direct or

indirect discrimination (Fainstain and Perrotta, 2011). An example of a gender gap could be a salary gap, usually due to indirect discrimination related to the care economy and the time spent by women on domestic tasks. This gender gap can hinder women's participation in the labor market. In fact, there may be cases in which lower remuneration for women is deliberate.

Gender Equality and Equity

Literature on gender concepts refer to both equality and equity; therefore, it is important to clarify their differences and when they should be used. Gender equality does not mean that men and women are identical; it means they have equal access to rights. Their existing differences should not be a cause of discrimination for access to opportunities and enjoyment of rights (UN Women, CPEM and ECLAC, 2021).

On the other hand, the concept of equity is related to the principle of justice. Equity seeks to repair inequalities between men and women. To this extent, gender equity is the instrument through which equality is built, regardless of inequalities based on sex (Fainstain and Perrotta, 2011). In other words, it could be said that equality refers to the possibility that men and women hold the same starting conditions to participate in public and private settings, while equity has to do with the practical

action that is carried out to overcome historical disadvantages (Ramírez, 2017).

Unconscious Gender Stereotypes and Biases

Gender stereotypes are preconceived ideas that are structured in societies in relation to the sex of people. They generalize opinions that justify certain behaviors and characteristics as typical of each gender. Based on the persistence of gender stereotypes, social structures that have traditionally established unequal relationships are perpetuated. For example, there is the stereotype that women are naturally caregivers, a belief that has served to maintain the social organization of care in the hands of women, relegating them to unpaid domestic and care chores (Faculty of Human and Economic Sciences [FCHE], 2021).

Stereotypes are directly linked to the influence of unconscious gender biases when making decisions. They "place women at a disadvantage compared to men in a certain area" (INAMU, 2017, p. 5). Thus, unconscious biases are beliefs about the feminine and masculine that intervene in decision-making circumstances. They are guided by ideas that come from social learning that affect the organizational environment based on stereotypes regarding capabilities and characteristics of men and women. (Leal et al., undated).

These appear, for example, in selection processes, hiring and job promotions, among others.

Gender Roles

Gender roles are reinforced and established from the abovementioned two concepts. Gender roles are understood as those behaviors that are learned in a society where men and women are conditioned to perceive activities, actions and jobs as belonging to the feminine and masculine (UN Women, CPEM and ECLAC, 2021). These roles are influenced by other variables such as age, religion, class and ethnicity. Non-conformity can lead to social sanctions.

A clear differentiation between masculine and feminine roles has been identified in several gender studies. While the former have been located in the public sphere, the latter revolves in the private one. In this sense, men have enjoyed the role of economic providers, while women have endured the role of caregivers, thereby affecting their economic autonomy and participation in regards to work environments and public leadership (FCHE, 2021).

Care Economy

According to DANE (2022), “the care economy is the set of social relations of production, distribution, exchange and

consumption of care services that can be commercial or non-commercial” (p. 2). The care economy is mainly dominated by women, and it is a fundamental concept because it establishes the relationship between paid and unpaid work, as well as its effects on the development of professional and working life. Based on this concept, scholars have introduced the idea of the double workload faced by women. Compared to men, this workload can more than double when including the hours dedicated to cleaning activities, caring for dependent people, household chores, etc. (DANE, 2022)

This structure has its roots in what is known as the sexual division of labor, whereby activities are established based on sex and women have historically occupied domestic activities. This generates a division of the hierarchical order, provided that domestic activities are socially and culturally less valued than those associated with the masculine (UN Women, CPEM and ECLAC, 2021).

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Step 4: Elements of Analysis

After developing the three previous steps, companies can begin the assessment process. The research team consulted different national and international tools and experiences to develop this section. The analysis led to the definition of six categories that generally encompass gender equity dimensions.

This section will help the company track inputs to determine its gender situation and conditions. This section includes the following: first, it lists the contents of each category; second, it presents inputs that the organization must track in order to carry out its evaluation process; and lastly, it explains the main indicators that can be used for each category.

Organizational Culture

Private companies include people who interact with each other, and who, in their individual and collective formation, have adopted a system of values that they share with their social environment. Under this dynamic, it is possible to build an *organizational culture* in each company where symbolic practices are reproduced (Mena, 2019). A gender analysis within the company culture refers to the informal rules, customs, values, personal opinions and attitudes towards gender equity from the organization's members. That said, the organizational assessment is intended to determine "if the staff manifest any discriminatory gender social schemes,

what are their attitudes towards gender equity and how does this affect the work of the institution" (Díaz and Gutiérrez, 2014, p.16).

This organizational culture analysis should not only make it possible to discover scenarios of direct discrimination that may arise toward men or women in the company, but it can also contribute to the discovery of stereotypes and gender roles within the organization. The assessment should evaluate not only the opinions, values and beliefs of leadership and people in managerial positions, but also the opinions of the entire staff. In this regard, attention should be paid to the needs of men and women with respect to the different roles each play within the organization. The assessment should also look at difficulties and potential they perceive for professional development, as well as the way in which they believe gender biases are expressed in the organizational culture (INAMU, 2017; Díaz and Gutiérrez, 2014).

Category Analysis Process

Two complementary instruments are proposed for the specific analysis of the company's gender equity situation. One includes quantifiable indicators, and the other features a guide for performing anonymous individual interviews and group interviews. The research team included these two instruments based

on a careful review of various national and international instruments, such as the 2021 Par Ranking, the Ibero-American Ombudsman Federation (FIO) manual and the WEPs Tool.

For the indicators, companies should provide a yes/no answer accompanied by evidence corroborating the response given. Evidence may include technical documents, guides, protocols, instruments, processes, policies or plans. If no evidence can be produced then a negative answer must be given. These indicators reveal the company's commitment and the consolidation of an internal culture in favor of gender equality. Negative answers should lead to

the identification of areas where targeted actions should be defined.

A process for individual interviews should start with a mapping of strategic actors within the organization who can participate in interviews regarding core organizational culture issues. Individual interviews should be offered to every company employee, ensuring dynamism and the highest possible participation. Interview questions should be asked in a way that provides safety and confidentiality to all employees, where they can express their needs, feelings and proposals in relation to gender equity. Negative responses should be seen as alerts that must be addressed.

Indicators	Answer	
	Yes	No
The company conducts gender equity and equality awareness workshops in work environments.	Yes	No
The company holds a planned and documented training program on gender equity issues.	Yes	No
The company is committed to leadership and support for gender equality.	Yes	No
Gender equity and equality are part of the organization's values.	Yes	No
The company counts on a manual or protocol to avoid gender biases and sexist language in its internal communications and advertising/marketing.	Yes	No
The company has an approach that supports male and female employees in their role as caring parents.	Yes	No
The company offers flexibility, maternity, paternity and wellness benefits to its personnel.	Yes	No
The most senior leadership level is committed to gender equity and equality in the company.	Yes	No
The company has publicly punished or rejected behavior that is not sensitive to gender, such as jokes and sexist comments, pranks, and others.	Yes	No
The company systematizes the hours dedicated to home care and responsibility tasks per employee.	Yes	No
The company systematizes the hours dedicated to educational tasks and accompanying children.	Yes	No

Source: Prepared by the author based on (Díaz and Gutiérrez, 2014; Aequales, 2021)

Qualitative Analysis Instruments for Organizational Culture	
Participants	Group Interview Questions
Key actors in each area of the organization. Group representatives within the organization. Management and leadership positions	Do you think that gender equality and equity should be an institutional commitment?
	What is your level of commitment to gender equality and equity?
	Do you think that discrimination against women/men persists in society?
	Do you think there is discrimination against women/men in our organization?
	Do you think women have any difficulty in exercising leadership positions?
	Do you think there are areas where women work better in our organization? In which ones? ¹
	Do you think there are areas where men work better? In which ones?
Management and leadership positions	Do you think that the company should take action in regards to domestic work and care activities?
	Do you think there are differences between men and women when leading? Which?
Participants	Individual Interview Questions
The company's largest representative sample	Do you think that discrimination against women persists in society?
	Do you think there is discrimination against women in the workplace at our organization?
	Do you think that the company has made progress on gender equity issues?
	Do you think that women have any difficulty in exercising leadership positions?
	Do you think there are areas where women work better in our organization? In which ones? ²
	Do you think there are areas where men work better? In which ones?
	Is there any "macho" or sexist behavior from men?
	Do you think that sexist language should be punished? (Jokes, pranks, comments, teasing).
	If you were to go through a situation of domestic violence, would you feel supported by your company and colleagues?
	What aspects of the organizational culture are conducive to gender equality? ³
What aspects of the organizational culture hinder gender equality, and what do you consider that needs to be changed? (mention visible and invisible aspects)	

Source: Prepared by the author based on (Díaz and Gutiérrez, 2014; Aequales, 2021)

1 The options must be established according to the company areas set forth in its structure. The team in charge of performing the diagnosis can choose freely.

2 The options must be established according to the company areas set forth in its structure. The team in charge of performing the diagnosis can choose freely.

3 Mention visible or formal aspects such as policies, rules and procedures, as well as invisible or informal ones, such as respect between people, differential treatment, jokes or gestures.

Díaz and Gutiérrez (2014) feature a useful matrix for exploring and analyzing a company’s organizational culture. It is specifically aimed at understanding the unconscious biases and gender roles present within company personnel in regards to leadership and authority. This matrix can be used during the interviews to identify employee perceptions with respect to the feminine and masculine

leadership models. The exercise consists of listing various characteristics possessed by a successful person, and then associating them in the matrix according to gender. For example, if the trait is the person’s speech prowess, the respondents will need to answer if said characteristic corresponds to a successful woman, a successful man or both. This demonstrates the presence of stereotypes among employees.

Characterization of Success According to Gender		
Characteristics	Successful Woman	Successful Man
Sympathy		
Dedication		
Efficiency		
Commitment		
Individualistic		
Young		
Adult		
Speech Prowess		
Seriousness		

Source: Prepared by the author based on (Díaz and Gutiérrez, 2014).

Strategic Planning and Management

The second component that must be considered refers to planning and management, particularly strategic planning around gender equity and institutional systems. This analysis will enable the evaluation of commitment to gender equity by setting goals, indicators,

policies and action plans. This planning and management will also help in the development of mechanisms, tools, protocols and actions to measure equal opportunities for women and men (Díaz and Gutierrez, 2014).

This category is related to the other how-to guide on designing gender equity business policies, given it incorporates a strategic planning framework from the

theory of change model, a useful tool for policy design. Based on the foregoing, the strategic planning process should begin with the definition of a problem statement, followed by the definition of objectives and goals tied to that statement. Resources must be allocated to those objectives and goals to provide solutions and strategies within a specific timeframe (Rogers, 2014).

In this category the organization's actors and stakeholders are expected to articulate and coordinate a series of actions for making decisions and obtaining certain results. In short, this category is fundamental given that every company "needs direction, guidelines or policies that someone, through internal and external analysis, determine what are the objectives that are expected to be obtained in the future. That is when strategic planning arises" (González et al., 2019, p. 244). This how-to guide corresponds to measuring the path to gender equity. The how-to guide on policy design is the next step.

The company should establish organizational and performance goals, design strategies and policies to achieve these goals, and implement detailed plans to develop those strategies and proposed goals.

Category Analysis Process

To analyze this category, the company should employ a series of proposed indicators to be used during gender equity planning and management. The list of questions can be used to conduct individual or group interviews regarding strategic planning and management. The indicators are qualitative and quantitative and look at information systems and databases with a gender perspective. The company should establish organizational and performance goals, design strategies and policies to achieve these goals, and implement detailed plans to develop those strategies and proposed goals.

To analyze compliance with these indicators, at least one piece of evidence must be submitted, such as a technical document, a presentation, a guide, a database, an action plan or a policy. Ideally, the company would have affirmative answers for all indicators and not find statistically significant gaps in their answers. Interviews can be conducted with decision-makers, who are part of the Board of Directors and others who coordinate planning and management processes within the company. The interview questions should be asked in order to identify the strengths and weaknesses related to the core issues of gender equity strategic planning and management.

Qualitative Indicators	Answer		Product
A gender approach is included as a framework or approach within the organization's objectives or actions	Yes	No	Organizational document
Existence and documentation of a gender equity policy in force	Yes	No	Policy document
Existence and documentation of an updated and current action plan for gender equity	Yes	No	Plan document
The action plan establishes the objectives and goals to be met related to indicators	Yes	No	Action plan document
Which of the following elements are included in your gender equity policy or action plan?	Approach including a detailed and analyzed problem		Policy or Action plan document
	Gender equity and intersectional principles and approaches		
	Objectives and goals are clearly defined		
	Coherent actions and alternative solutions are proposed		
	Inclusion of an implementation plan		
Which of the following options are part of the strategic lines of your policy or action plan?	Unconscious biases and cultural patterns		Policy or Action plan document
	Parity in leadership and decision-making positions.		
	Salary gaps		
	Recruitment and selection processes		
	Prevention, attention to and punishment of sexual harassment and gender-based violence		
Personal, family and work/life balance			
Gender equity goals are formulated in the performance indicators and in the budget	Yes	No	Company performance indicators

Qualitative Indicators	Answer		Product
The company sets goals to reduce leadership gaps and have a minimum number of women in different company areas	Yes	No	Document establishing these goals
Gender is considered during strategic activity planning, actions and benefits	Yes	No	Design documents for actions, strategies or benefits
Identify if there are gender indicators in the follow-up and assessment system in company policies, strategic and operational plans.	Yes	No	Battery of indicators or list of indicators
Determine if gender is included in information systems and personnel databases	Yes	No	Updated database or information system
Determine if gender is included in external user information systems and databases	Yes	No	Updated database or information system
The company has a system to keep records of reports or complaints disaggregated by sex	Yes	No	Updated database
The company allocates annual resources to work on gender equity issues	Yes	No	Budget planning document
There is a person, unit or committee responsible for gender issues	Yes	No	Document regarding committee structure or meeting minutes
Quantitative Indicators	Answer		Product
Budget amount allocated to gender equity management	Less than 5% of the budget Between 5% and 10% More than 10% of the annual budget		Financial planning sheets or investment documents
Percent that action plan objectives and goals have been met	Less than 20% Between 20% and 50% Between 51% and 75% Between 76% and 100%		Action plan follow-up sheets
Percent that goals associated with performance indicators have been met	Less than 20% Between 20% and 50% Between 51% and 75% Between 76% and 100%		Performance indicators follow-up sheets
How often do you follow-up on gender equity goals and indicators?	Once per year Every 2 years Every 6 months		Follow-up sheets

Source: Prepared by the author based on: (Aequales, 2021; Díaz and Gutiérrez, 2014; Inter-American Commission of Women [CIM for its acronym in Spanish], 2015).

Interview Questions	Strengths	Weaknesses
How would you rate gender integration in the company's information systems and databases?		
What do you think about the design and implementation of the gender equity policy? If there is no policy, do you consider it important?		
What do you think about the design and implementation of the gender equity action plan? If there is no action plan, do you consider it important?		
Is the information regarding the company's gender indicators, goals and objectives accessible?		
Does the planning, follow-up and assessment system integrate gender?		
How is the company doing in terms of formulating gender indicators to measure progress? What aspects do you think should be changed?		

Source: Prepared by the author based on (Díaz and Gutiérrez, 2014)

Co-responsibility and Well-being Strategies with a Gender Approach

This category is closely related to the concept of *care*. Although all people are care recipients, not all perform these tasks in equal measure. Gender studies and feminist movements have called on people to reflect upon society's care structure, provided it has been mainly created based on gender. According to Fraser (2008), this care structure is rooted in the continuation of gender roles where women, or the feminine, are relegated to

the private sphere as care and domestic work providers. On the contrary, men have been appointed as economic and material providers in the public sphere (2008).

Based on this construct, studies have shown that women perform a double shift or working day due to this socially constructed role. Their duties are distributed between domestic activities and their professional and work lives. This was evidenced in the latest report issued by DANE regarding the time dedicated to Unpaid Domestic and Care Work (TDCNR *for its acronym in Spanish*) in 2021, where women contributed 77.7%

of the total annual hours. Among the activities considered in this category are food supply (84%); clothing maintenance (87%); household cleaning, maintenance and repair (72%); purchases and home management (52%); care and support for people in the home (79%); and volunteering (74%). (DANE, 2022). This reality not only makes women more likely to experience increased levels of stress, depression, and physical and mental exhaustion, but also decreased and unequal participation in the labor market (Aequales, 2021).

Given this situation, this category calls on companies to reflect upon and implement actions to reduce gender gaps resulting from care responsibilities at home. This section assesses corporate co-responsibility through the establishment of services, benefits and activities “aimed at setting, promoting, regulating or guiding the social organization of care activities toward a democratic direction” (FCHE, 2021, p. 11).

Category Analysis Process

This category focuses on the development and implementation of well-being strategies for personal, family and work/life balance. It also revises actions in the field of mental health, legal and financial advice, personal care, and sexual and reproductive health, among others. A series of qualitative and quantitative

indicators are proposed to determine the progress made and challenges faced by the company. Moreover, a series of individual or group interviews can be conducted in order to assess the needs of men and women in the company (Díaz and Gutiérrez, 2014).

The indicators must be supported by various documents, such as plans, reports, assessments and systematizations. This documentation provides inputs to study benefits granted by the company, as well as the gender-disaggregated record of those who access them. As stated above, the ideal scenario is that these indicators be answered affirmatively. Those that are not, should be labeled as areas for improvement. In the case of qualitative indicators, a matrix will be presented so that each company, according to its particularities, determines the specific data corresponding to its gender strategies. Interviews will be carried out differently for men and women, in order to track the challenges and improvement possibilities with regards to the needs and demands of each.

The indicators must be supported by various documents, such as plans, reports, assessments and systematizations. This documentation provides inputs to study benefits granted by the company, as well as the gender-disaggregated record of those who access them

Qualitative Indicators	Answer		Product
Does your organization implement flexible or staggered hours?	Yes	No	Human resources document, or documents where these actions are approved
Do you have flexible days for dependent care or special dates?	Yes	No	Human resources document, or documents where these actions are approved
Does the company offer remote work?	Yes	No	Human resources document, or documents where these actions are approved
Does the company offer support to prevent and accompany domestic violence victims?	Yes	No	Human resources document, or documents where these actions are approved
Does the company offer paid leaves in addition to legally-mandated leave for needs, such as caring for a family member or a dependent?	Yes	No	Human resources document, or documents where these actions are approved
Does the company offer service bonuses or does it have services, such as a gym, laundry, food or other facilities for men and women to better manage their time?	Yes	No	Human resources document, or documents where these actions are approved
Does the company facilitate assistance in mental health and psychology for employees and their families?	Yes	No	Human resources document, or documents where these actions are approved
Does the company facilitate legal assistance for employees and family members?	Yes	No	Human resources document, or documents where these actions are approved
Does the company offer services, bonuses or subsidies for day care centers or childcare?	Yes	No	Benefit records, documents where the benefit is registered
Does the company implement flexible strategies for parents according to their child's age?	Yes	No	Benefit records, documents where the benefit is registered
Does the company offer a staggered return for fathers?	Yes	No	Benefit records, documents where the benefit is registered
Does the company offer a staggered return for mothers?	Yes	No	Benefit records, documents where the benefit is registered
Does the company offer support groups, workshops or other services for mothers?	Yes	No	Benefit records, documents where the benefit is registered
Does the company offer support groups, workshops or other services for fathers?	Yes	No	Benefit records, documents where the benefit is registered
Does the company offer extended maternity leave?	Yes	No	Benefit records, documents where the benefit is registered
Does the company offer extended paternity leave?	Yes	No	Benefit records, documents where the benefit is registered
Does the company track the number of men and women accessing care and flexible services in order to target strategies and understand the distribution of care roles?	Yes	No	Access to benefits indicators, lists of beneficiaries, databases

Source: Prepared by the author based on (Aequales, 2021)

Quantitative Indicators: People with Access to All Gender Based Benefits, Services and Strategies for Personal, Family and Work/Life Balance

Service	Percentage of Women	Percentage of Men

Source: Prepared by the author based on (Díaz and Gutiérrez, 2014)

Interview Questions	Male Response	Female Response
How accessible are co-responsibility and care services?		
To what extent does the supply of co-responsibility and care services satisfy the demand (by sex)?		
To what extent have you accessed co-responsibility and care services when you have need them?		
To what extent do the co-responsibility and care services respond to the differentiated demands and needs of each sex?		
To what extent does the company take into account the different positions of women and men when determining its co-responsibility and care services?		
Do the services contribute to reducing gender gaps and inequities?		

Source: Prepared by the author based on (Díaz and Gutiérrez, 2014)

Attention to Violence, Workplace Harassment and Sexual Harassment

To encourage companies to target actions for the prevention, care and punishment of sexual and workplace harassment, strategies to address this issue are presented separately. It is worth noting that during validation sessions, participants defined this matter as critical. This issue

continues to be difficult to address in many companies, given there are little to no existing mechanisms or knowledge on regulations governing this topic.

According to the International Labor Organization (2018), there is a growing demand to address situations of harassment and gender-based violence in the workplace. This is internationally relevant, given that the SDG goals in the 2030 Agenda sets the importance

of ending all forms of discrimination against women and girls. This includes the elimination of all forms of violence in the workplace in both the public and private sectors (ILO, 2018).

This international mandate was reinforced in the country with Ruling T-140 rendered by the Constitutional Court in 2021. In said judgment, the Court accepted ILO Convention 190 on harassment and violence in the workplace. Although said Convention has not been ratified by Colombia (as of 2023), it complements other international standards already existing in the country. The Court recognizes that violence against women is systematic and is not alien to work contexts. To that extent, the Court deemed it necessary to consider violence in work environments to identify causes, risk factors and power relations that generate gender discrimination. According to the Court, the Convention's preamble recognizes:

The right of everyone to a workplace free from violence and harassment, including gender-based harassment. It also warns of the consequences of violence and harassment in the workplace and argues that these may constitute a violation or abuse of human rights, qualifying them as an unacceptable threat to equal opportunities and incompatible with decent work. It also highlights the importance of a work culture that is based on mutual respect and the dignity of the human being in order to prevent

violence and harassment. (Constitutional Court, 2021, Ruling T-140).

Category Analysis Process

This section tries to identify if companies have experienced harassment cases and analyzes the manner in which these have been addressed using its strategies, policies or action plans. Qualitative and quantitative indicators can be used to demonstrate the existence of protocols, policies or plans on the prevention, attention to and punishment of sexual and workplace harassment. Data should be presented to justify these actions. Companies with a history of sexual harassment at work can conduct interviews using the guide to record perceptions, opinions and points of view on the topic (INAMU, 2017). It is important to highlight that these individual approaches must start by recognizing the victims of these actions. It is ideal for those carrying out these interviews to have training on sexual and workplace harassment.

It is important to highlight that these individual approaches must start by recognizing the victims of these actions. It is ideal for those carrying out these interviews to have training on sexual and workplace harassment.

Qualitative Indicators	Answer		Product
The company carries out training and raises awareness to prevent workplace sexual harassment	Yes	No	Planning documents, reports, minutes
The organization holds a documented process or protocol for the prevention, care and punishment of sexual harassment	Yes	No	Protocol document
The company is committed to and provides psychological support for victims of workplace sexual harassment, domestic violence and other types of gender-based violence	Yes	No	Regulation document and benefit receipt documents
The company is committed to and provides legal support or technical defense for victims of workplace sexual harassment, domestic violence and other types of gender-based violence	Yes	No	Regulation document and benefit receipt documents
The company keeps a record, database or system with complaints of workplace sexual harassment, harassment, domestic violence and other gender-based violence	Yes	No	Database
There is a unit or team trained to deal with these cases	Yes	No	Team consolidation structure or documents
Quantitative Indicators	Men	Women	Product
Number of cases presented			Database
Number of cases investigated			Database
Number of sanctions			Database

Source: Prepared by the author.

Interview Questions	Male Response	Female Response
If you are being or have been a victim of sexual harassment, harassment or gender-based violence in the company, are you aware of the company's reporting mechanisms?		
If you are being or have been a victim of sexual harassment, harassment or gender-based violence in the company, do you feel confident in reporting it?		
If you were enduring a situation of workplace sexual harassment, do you think your company would provide you support? Do you think your colleagues would support and believe you?		
How would you evaluate processes for the prevention, care and punishment of workplace sexual harassment? Is trust being built during these processes?		
What recommendations would you make to the company to prevent, address, and punish sexual harassment, harassment, and all types of gender-based violence?		

Source: Prepared by the author.

Organizational Structure

The private sector must be involved in promoting gender equity because it is a key actor in women's economic empowerment. Different analyses have shown the obstacles that women face in work environments when searching for economic autonomy. These can be explained by different social and cultural factors, such as educational level, occupational position, poverty, and time devoted to unpaid domestic and care work, among others.

To explain these gaps, gender studies have used the "glass ceiling" phrase. They are referring to the gaps and invisible barriers that prevent qualified women from reaching positions of power and decision-making in the organizations where they work (Camarena and Saavedra, 2018). These barriers may be conscious or unconscious. They may be due to a lack of credibility in a woman's leadership skills because of her sex, or it may be the result of working a double shift within the care economy. Hence, women are prevented from participating in the economy with the same condition as men (UN Women, 2018). After recognizing these factors, companies should make decisions to eliminate these barriers in their workplaces. This process can be accomplished either through the establishment of guidelines that control the prevalence of unconscious biases, or through strategies that allow

women to balance their personal, family and work lives.

This category revisits the status of the company's organizational structure to analyze the existence of gender gaps in the organizational chart, work areas, high ranking positions and organizational levels. According to UN Women (2018), women tend to achieve parity or increase their participation solely in administrative and lower-ranking company levels. They also receive fewer promotions during their professional careers.

Category Analysis Process

This category looks at the composition of the company's organizational chart. An organizational chart is a graphical representation of the structure, division of tasks and hierarchies set forth in the company's different areas. The purpose of this analysis is to acknowledge the company's hierarchical levels and the number of men and women in each one. It also can be useful to review the composition of the Board of Directors and company areas, including employee breakdowns by sex. Furthermore, it seeks to identify the number of men and women in terms of promotions and hiring.

A series of quantitative indicators can be used to determine whether or not gender gaps exist and where they are the

greatest. For this analysis, we recommend using the hierarchical division presented by Aequales in its measurement instrument. According to that tool, the highest hierarchical level is made up of the General Manager or CEO, followed by the Board of Directors, and afterwards, by

seven more ordered levels from highest to lowest rank, although not all companies will exhibit this exact disaggregated structure. The “Not applicable” answer can be used in such cases. The end of the table includes questions to analyze the structure.

Number of People per Hierarchical Level	Men	Women	% Men	% Women
How many people make up the entire organization				
General Manager/CEO				
Board of Directors/Steering Group				
First level				
Second level				
Third level				
Fourth level				
Fifth level				
Sixth level				
Seventh level				
Average Salary by Sex per Hierarchical Level	Average Salary for Men		Average Salary for Women	
General Manager/CEO				
Board of Directors/Steering Group				
First level				
Second level				
Third level				
Fourth level				
Fifth level				
Sixth level				
Seventh level				
Number of Men and Women by Work Area	Men	Women	% Men	% Women
Administration				
Customer Service				
Trade/Sales				

Purchases				
Communications				
Design				
Finance/Accounting				
IT				
Marketing				
Operations/Logistics				
Strategic Planning				
Human Resources				
Production				
Number of Men and Women by Work Area	Men	Women	% Men	% Women
Promotions				
Training				
Hiring				
Questions to Answer	Answer		Observations	
Is there a balance between men and women in the formal division of responsibilities within the company, at all levels and positions?	Yes	No		
Are there gender gaps or biases in access to training, promotions and remuneration?	Yes	No		
Does the structure include specific spaces or mechanisms for the promotion of gender equality at decision-making levels?	Yes	No		
What implications does all of the above have for the company?				

Source: Prepared by the author based on (Díaz and Gutiérrez, 2014; Aequales, 2021)

It is worth noting that this analysis might not be as applicable for small and medium enterprises (SMEs), as noted in the validation workshop. This guide can be adjusted to the characteristics of each company to assess its structure. If the company has no hierarchical structure, the company can use the indicators that are most applicable and justify why other questions do not apply.

Human Resources Management with a Gender Approach

In order to make progress on the path toward gender equity, companies must structure internal human resources processes and management that promote equal opportunities for men

and women. The creation of incentives and reflecting on methodologies for training and performance, job promotions, hiring, salaries, selection processes and recruitment processes can all be included in this analysis to improve human resources (Ramírez, 2017).

This category on human resources management is paramount because it implies thinking about the actual implementation of actions to achieve gender equity. Certainly, some departments in charge of human talent may lack the managerial skills or qualified personnel to successfully apply actions required to support gender equity. Companies should analyze how they select and recruit candidates while paying special attention to unconscious biases that could interfere in the selection process (Aequales, 2021). The same applies to hiring, training or job promotions, where cultural and social norms may influence outcomes.

This analysis can help companies identify whether they have designed standardized strategies and procedures to achieve the greatest possible objectivity in decision-making processes.

This analysis can help companies identify whether they have designed standardized strategies and procedures to achieve the greatest possible objectivity in decision-making processes. Companies should reflect on the existence of direct or indirect discrimination that may favor one sex over the other, particularly with regard to access, promotion, training and remuneration for certain positions within the organization.

Category Analysis Process

This category is mainly evaluated using procedures, policies, documents and criteria established and managed by the human resources team. This documentation should include anything that is used by the company to set salaries, in hiring efforts, job promotions, training exercises, as well as personnel recruitment and selection processes. Qualitative and quantitative indicators can be used by the company to evaluate its human resources management. Evidence should be provided for any affirmative response.

The human resources management team can be interviewed individually or in a group using the questionnaire. These interviews are intended to identify strengths, weaknesses and needs regarding human resources management. They also seek to analyze whether actions are perceived positively by men and women in the organization.

Qualitative Indicators	Answer		Product
The organization implements blind interviews in the hiring processes	Yes	No	Recruitment Interview Guide/ Document
The organization has a mixed evaluation committee	Yes	No	Document with the appointment of persons in charge
The organization uses inclusive language when speaking on the phone	Yes	No	Calls made, communications guide
The organization has established a procedure for training sessions	Yes	No	Document where it is recorded
The organization has established procedures and documented criteria for promotions	Yes	No	Document where it is recorded
The organization has a documented salary policy or procedure	Yes	No	Document where salary tables are found.
Staff training is carried out during working hours	Yes	No	Minutes/reports/schedules
There are affirmative actions for the promotion of women at all company levels	Yes	No	Company commitments, goals, and statements
The company has gender-sensitive procedures for personnel performance evaluations	Yes	No	Procedures used during the performance evaluation
The company evaluates employee performance based on results	Yes	No	Procedures/documents or contracts
Elimination of the gender category in CVs received	Yes	No	Assessed CVs, requests for CVs
The company carried out a salary gap assessment in the organization.	Yes	No	Most recent assessment
The company has clearly defined, detailed and written profiles required for each position	Yes	No	Document with these profiles

Source: Prepared by the author based on: (INAMU, 2017; Aequales, 2021, Díaz and Gutiérrez, 2014)

Interview Questions	Male Response	Female Response
Do you believe that processes implemented in human resources management are sufficient for gender equity?		
Do you believe that remuneration processes are based on objective criteria?		
Do you consider that the company's promotion processes integrate gender criteria?		
Do you think the company has equal gender distribution in its different areas?		
Have you ever felt that decisions regarding human resources are based on biases or gender stereotypes?		
What elements do you think must be taken into account to avoid gender biases in human talent management processes?		

Compressed Information

Any company that has conducted this analysis has gathered a series of information, documents, databases and answers that are very useful for analyzing gender gaps. This information must be reviewed within the framework of the specificities and capabilities of the company, taking into account its size, resources, personnel, and sector, among other variables. This section responds to concerns identified during the validation workshop. Many small and medium enterprises (SMEs) do not have

the structure and capacity necessary to carry out the suggested analysis processes.

The following tool can be used by an SME to self-assess its position on gender equity issues. The team in charge can analyze weaknesses identified about the organizational structure, size and economic performance, among others factors. A SWOT Matrix can be used to list the strengths, opportunities, weaknesses and threats of the organization with regards to gender equity gaps.

	Strengths	Opportunities	Weaknesses	Threats
Step 1: Gender Team or Committee				
Step 2: Raising Awareness				
Step 3: Conceptual Framework				
Step 4: Organizational Culture				
Step 4: Strategic Planning				
Step 4: Co-responsibility				
Step 4: Attention to Violence and Sexual Harassment				
Step 4: Organizational Structure				
Step 4: Human Resource Management				

For the purposes of completing this tool, strengths are those special abilities the company has, as well as its comparative advantage. Opportunities are those positive and external factors found in the business environment that will allow the

organization to achieve its advantages. Weaknesses are understood as unfavorable elements, such as the lack of resources, skills and activities. Finally, threats are defined as outside challenges that threaten the organization's stability (Ponce, 2007).

Conclusion

All of the information regarding gender gaps in companies collected during this assessment process constitutes fundamental input for the formulation, updating and adaptation of gender equity policies. Results obtained in the steps described above should be analyzed to facilitate planning and prioritization of necessary actions to continue on the path of gender equity.

Companies should identify weaknesses and strengths for each of the six dimensions analyzed in Step 4. This exercise will allow for the prioritization of critical and fundamental points to be addressed within the company. It is important to point out that each company will select the issues to consider during policy formulation based on its priorities, interests, strengths and economic, human, physical and technological resources. This assessment will become a necessary tool for defining the issues, objectives and goals that will be established in the gender equity policy. This process will serve as a baseline that will enable the company to demonstrate and describes its main gender equity challenges and progress.

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