Gender Equality, Disability & Social Inclusion (GEDSI) Toolkit: Guide and Overview

Transforming Energy Access Platform

A practical toolkit to get started or deepen your practice and understanding of Gender Equality, Disability, and Social Inclusion within your Transforming Energy Access (TEA) project.

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Produced by: VALUE FOR WOMEN, CARBON TRUST

Input by: Global Disability Innovation Hub

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Transforming Energy Access works via partnership to support emerging clean energy generation technologies, productive appliances, smart networks, energy storage, and more. It increases access to clean, modern energy services for people and enterprises in sub-Saharan Africa, South Asia and the Indo Pacific, improving their lives, creating jobs and boosting green economic opportunities.

This updated version of the toolkit was developed by Value for Women on behalf of the TEA platform, with key insights provided by Global Disability Innovation Hub and the Carbon Trust.

The following team members from Value for Women involved in producing this toolkit included: Asya Troychansky, Bernice Nyoike, Cavelle Dove, Erica Berthelsen, Silvia Emili and Yvonne Krywyj.The design was completed by: Dea Jansen, Gerardo Mejia and Karina Perez.

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The following team members from Carbon Trust contributed to the production and review of this toolkit: Kate Hooper and Caroline Hellgren. This toolkit was adapted from an initial version developed by the Carbon Trust.

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The Partners

Value for Women (VfW) provides gender support advisory services under the TEA platform. VfW is a global social enterprise founded on the belief that the private sector is an untapped catalyst for change. We change the way that business, finance, and investment operate in emerging markets to achieve gender & social equality. We do this by making gender inclusion accessible and actionable. VfW provides gender support advisory services under the TEA platform.

Global Disability Innovation (GDI) Hub offers a cross-platform delivery support service to TEA partners for targeted disability inclusion and innovation across energy access programmes. GDI Hub is a world leading delivery and practice Centre, an Academic Research Centre at University College London (UCL), and the first World Health Organization (WHO) Global Collaborating Centre on Assistive Technology; accelerating ideas into impact for a more just world—for disabled people, and all people. GDI Hub works in 40+ countries, with a reach of more than 64 million people since 2016, developing homegrown technologies alongside new knowledge and research. GDI Hub is home to the UK aid-funded AT2030 programme which tests 'what works' to improve access to life- changing Assistive Technology (AT) for all.

The Carbon Trust leads the consortium that provides oversight and management of the TEA platform. This includes support on communication, improving customer and energy portfolio data, gender equality and local inclusion. The Carbon Trust is a global climate organisation driven by the mission to accelerate the move to a decarbonised future. We have been pioneering decarbonisation for more than 20 years for businesses, governments, and organisations. Drawing on a network of over 400 experts internationally, the Carbon Trust guides organisations through their journey to Net Zero. From strategic planning and target setting to delivery, activation, and communication – we provide smarter ways to turn intent into impact.

The partnership between Value for Women, GDI Hub and the Transforming Energy Access (TEA) platform aims to incorporate Gender Equality, Disability and Social Inclusion (GEDSI) principles into energy access projects.

Snapshot Summary

The GEDSI Toolkit has been developed to support organisations in taking a Gender Equality, Disability, and Social Inclusion (GEDSI) lens to their work within the TEA platform and beyond. It provides resources, including guides, templates, and other training materials, to embed good practice to ensure accelerated action on socio-economic development, growth, poverty reduction, and equal access to clean, affordable energy.

Using this toolkit is highly recommended to improve your understanding of GEDSI and its importance for sustainable development. It also serves as a useful resource to support TEA platform reporting requirements.

Who is the toolkit for?

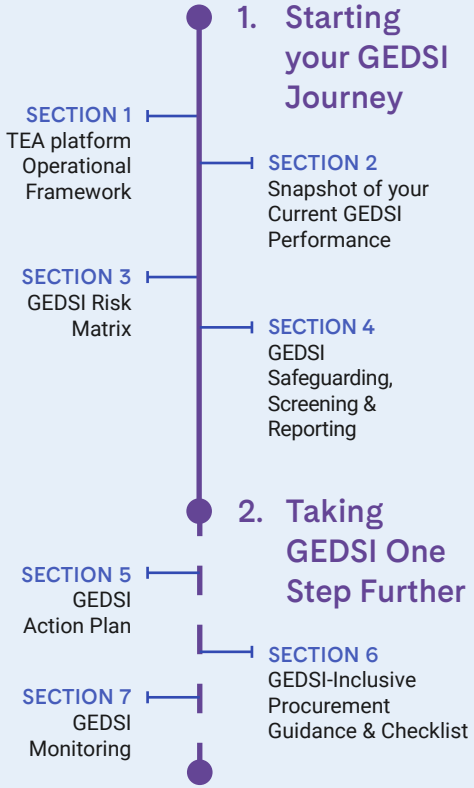
The toolkit is designed for TEA Delivery Partners. Downstream partners can also use the tools and may find Sections 2-6 most applicable. Partners should select tools according to their business stage, size and applicability to their GEDSI and business aspirations.

GEDSI Toolkit Components

1. This **Guide and Overview (PDF)** provides a summary of all tools and how to use them and will be the primary source to help you navigate the toolkit step by step. In addition, the toolkit also contains:
2. **Tools Template Excel Spreadsheet** - this sheet hosts additional editable versions of some of the tools. It provides templates for tools to be duplicated, completed and modified, as needed.
3. **Editable Microsoft Word Templates -** These templates contain fillable copies of some of the tools in this Toolkit and can be duplicated, completed, and modified as needed.

Toolkit Sections

The toolkit consists of 7 sections. Section 1-4 will support you on the start of your GEDSI journey whereas section 5-7 will take GEDSI one step further.



SECTION 0:

Quick Access and Toolkit Content

Instructions:

Please use this landing page to click through the sections.

You can also use the bottom navigation bar throughout the toolkit to change between sections.

SECTION	DESCRIPTION
Vision & Purpose of the Toolkit	Overview of TEA's vision, intended audience and objectives of the toolkit
Key Terms & Concepts	List of GEDSI definitions and links to additional resources
How to use the Toolkit	Guidance on how to navigate the toolkit and incorporate it into project operations
Section 1: TEA platform Operational Framework	A tracker to self-assess if you are meeting TEA platform GEDSI recommendations and best practices
Section 2: Snapshot of your Current GEDSI Performance	Tools to evaluate your project's baseline and how you are currently performing in terms of GEDSI
Section 3: GEDSI Risk Matrix	A risk management matrix for identifying, assessing and mitigating GEDSI-related risks on projects
Section 4: Safeguarding, Screening and Reporting	Safeguarding mechanisms for protecting project participants and ensuring your project does no harm
Section 5: GEDSI Action Plan	Putting your vision into tangible actions: A template to create a GEDSI Action Plan
Section 6: GEDSI-inclusive Procurement Guidance and Checklist	Tools to apply GEDSI across your project procurement practices
Section 7: GEDSI Monitoring and Indicators	How to collect disaggregated data with a GEDSI lens and measure results

Heifer International, Uganda, 2023- PREO

Vision and Purpose of the Toolkit

Why does GEDSI matter to TEA?

Despite some progress, the potential of women, people with disabilities, and other excluded groups in Low- and Middle-Income Countries (LMICs) remains unrealised, especially in energy access and poverty reduction programmes. The TEA platform aims to change this by integrating gender equality, disability, and social inclusion (GEDSI) into our decision-making and project activities, tracking results, and providing opportunities for excluded groups to develop skills and participate in economic activities.

Through the GEDSI toolkit, we want to work with partners to help embed these principles across all project stages, track progress, and ensure accountability. By focusing on inclusive participation, skill-building, and evidence-based insights, we can foster socio-economic growth, reduce poverty, and ensure equal access to affordable, reliable energy for all.

TEA platform GEDSI Principles

1. Human rights centred

Adopt a responsive, sensitive and aware, human rights approach as a cross-cutting principle to recognise the freedom, well-being and dignity of all people everywhere.

2. Evidence-based

Use data-driven, evidence-based, GEDSI disaggregated and verifiable results in decision-making.

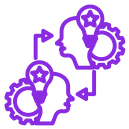
3. Achievable

Adopt appropriate, adapted and achievable project approaches to delivering on GEDSI, seeking to build on past successes and best practices achieved to date.

4. Participatory

Have inclusive and collaborative engagement in decision-making, especially from those who are most excluded such as women and people with disabilities – not just within GEDSI topics but wider project design and delivery.

5. Knowledge sharing



Support knowledge sharing and information dissemination to support collaborative learning and GEDSI skills development and awareness raising.

6. Transparent

Have transparency, accountability and regular monitoring of implementation and reporting on performance and learnings.

7. Accessible

Ensure minimum standards of accessibility are considered across TEA platform projects, considering the needs of people with disabilities.

Who and what is this toolkit for?

The purpose of this toolkit is to share practical guidance on how to integrate a GEDSI lens to TEA funded projects. It is aimed at providing support through examples of best practices, indicators, tools, and additional resources to align TEA's interventions with principles of gender equality and social inclusiveness. Additionally, the tools guide you in understanding how to improve your performance on the TEA platform. In summary, this document can be understood as a GEDSI starter kit, supporting TEA partners to:

1. Think with a GEDSI lens.

Through pragmatic examples of best practices, tools and resources, this toolkit guides TEA partners to apply GEDSI throughout their work.

2. Understand your starting point.

Identify your point of departure so you can benchmark against peers and track your own results through specific tools on GEDSI data collection, compliance and results measurement.

3. Move from understanding to action.

Tools such as the operational framework and GEDSI Action Plan template provide a roadmap for TEA Partners to integrate or improve the GEDSI lens in their projects.

Who is the toolkit for?

The toolkit is designed for TEA platform Delivery Partners, both those in Tier 1 and Tier 2. Downstream partners can also use the tools in Sections 2-6. Partners should select tools according to their business stage, size and applicability to their GEDSI and business aspirations

How does this link to TEA reporting requirements?

The toolkit is a set of recommended tools that partners may use to improve their GEDSI approach and, in some cases, meet TEA platform reporting requirements such as: risk mitigation, safeguarding, procurement, and reporting with a GEDSI lens. The completion of these tools is optional and is not directly linked to reporting processes and can be done at different times, based on the specific nature of your project. The suggested frequency is outlined on the navigation bar of each section.

Key Terms & Concepts

Below is a list of key terms and concepts as defined by the TEA platform.

Accessibility — Refers to enabling access to infrastructure, products, services, and facilities for all, particularly people with disabilities. Accessibility is driven by technical standards or design guidelines for the physical and digital infrastructure. Accessibility delivers access to equal participation as opposed to inclusive design that goes beyond access and delivers systemic inclusion.

Disability — According to the UN Convention on the Rights of Persons with Disabilities (CRPD), disability is "an evolving concept that results from the interaction between persons with impairments and attitudinal and environmental barriers that hinders their full and effective participation in society on an equal basis with others."

Disaggregate — The process of breaking down data into smaller sub-categories, such as gender, disability, age, or ethnicity, to analyse specific trends and insights.

Note: While disaggregated data could support inclusive decision-making, please be aware to collect them only based on relevance and individual's preference to disclose.

Discrimination on the basis of disability — As defined by the United Nations Convention on the Rights of Persons with Disabilities (UN CRPD): "any distinction, exclusion or restriction on the basis of disability which has the purpose or effect of impairing or nullifying the recognition, enjoyment or exercise, on an equal basis with others, of all human rights and fundamental freedoms in the political, economic, social, cultural, civil, or any other field. It includes all forms of discrimination, including denial of reasonable accommodation."

Gender — The roles, behaviours, activities, and attributes that a society considers appropriate for men and women at a given time. It includes social attributes and opportunities associated with being male or female, relationships between women and men, and relationships within the same gender. These attributes and opportunities are not fixed and can change over time. It is also important to recognise that gender is a continuum rather than a binary, and people may be people who are agender or third gender; those who are either biologically or ideologically not defined as either men or women.

Gender Equality — Where all individuals, regardless of gender, are free to develop their abilities and choices without constraints from stereotypes, rigid roles, discrimination, or prejudices. It ensures that women and men enjoy human rights equally, with their diverse behaviours, aspirations, and needs valued equally. It's not just a women's issue but involves the full engagement of both men and women, essential for sustainable and people-centred development.

Gender Equality, Disability, and Social Inclusion (GEDSI) — Gender Equality, Disability, and Social Inclusion is a concept that addresses unequal power relations based on the dimensions of gender, disability, age, wealth, location, ethnicity, language and agency or a combination of these dimensions.

Gender Equity — Ensuring fairness between women and men by addressing historical and social disadvantages that hinder equitable opportunities. This paves the way for achieving gender equality as both a legal right and societal obligation.

Gender Gap — Inequalities between women and men in societal roles, participation, access to opportunities, rights, decision-making power, income, benefits, and control of resources.

Gender Roles & Gender Norms — Societal assignments that shape individuals' identities. These roles dictate behaviours within gender norms, the accepted standards of behaviour in a society.

Inclusive Design — Inclusive Design can help all human beings experience the world around them in a fair and equal way by creating safe and accessible environments, products, and services for all members of the community. Inclusive design is a mindset and a methodology that embraces diversity to create a world that is more intuitive, elegant, and usable for all of us.

Leave No One Behind (LNOB) — Leave no one behind (LNOB) embodies the 2030 SDG Agenda's commitment to eradicate poverty, end discrimination, and reduce inequalities, addressing root causes to ensure inclusivity and sustainability.

Marginalised groups — Communities or individuals who are excluded or disadvantaged due to social, economic, or cultural factors.

Persons with disabilities — As defined by the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) "Persons with disabilities include those who have long-term physical, mental, intellectual, or sensory impairments which in interaction with various barriers, may hinder their full and effective participation in society on an equal basis with others."

Note that there are different preferences regarding terminology, with disabled people used more commonly in the UK and persons with disabilities internationally. Terms can be chosen on a case-by-case basis and, if possible, in consultation with persons with disabilities.

Reasonable accommodation — As defined by the UNCRPD as "necessary and appropriate modification and adjustments not imposing a disproportionate or undue burden, where needed in a particular case, to ensure to persons with disabilities the enjoyment or exercise on an equal basis with others of all human rights and fundamental freedoms."

Sex — As defined by the World Health Organisation, sex refers to the biological characteristics that define humans as female or male. While these sets of biological characteristics are not mutually exclusive, as there are individuals who possess both, they tend to differentiate humans as males and females.

Social inclusion — Enhancing participation and dignity for marginalised individuals and groups based on their identity. Target 10.2 of the Sustainable Development Goals (SDGs) seeks to empower and socially include all, regardless of age, sex, disability, race, ethnicity, origin, economic status, or other factors. Gender equality and social inclusion address unequal power relations due to factors like gender, wealth, ability, location, caste, ethnicity, language, and agency, aiming to rebalance these dynamics and ensure equal rights, opportunities, and respect for all individuals.

Youth — Individuals typically between the ages of 15 and 24 years old, though specific age ranges may vary based on cultural, legal, and contextual factors.

How to use the Toolkit

What are the components of this Toolkit?

The toolkit is composed of three key documents:

1. **Toolkit Guide and Overview:** This document provides an overview of all tools and how to use them. This document includes both tools within the document and accompanying fillable Word tool templates and step-by-step guidance on how to use tools that can be found in the accompanying spreadsheet.
2. **Tools Template Spreadsheet:** This sheet hosts additional editable versions of the same tools. It provides templates for tools to be duplicated, completed and modified, as needed.
3. **Fillable Microsoft Word Templates:** These templates contain fillable copies of the tools shown in this Toolkit and can be downloaded, completed, and modified as needed.

SokoFresh, Kenya, 2020 – PREO

How to use the individual tools

Each section includes a 'How-to' subsection to guide you through the functionalities and applications of the tools within each section. Some of these tools are formatted in Excel for ease of use and modification and are located in the accompanying spreadsheet, as mentioned. To use this toolkit, please take into account the following:

1 **You can access each tool by going to the relevant section, using the navigation bar at** the bottom of the page. Additionally, you can **find external editable tool templates** provided within the **'How-to'** subsection for each tool to understand its purpose and instructions.

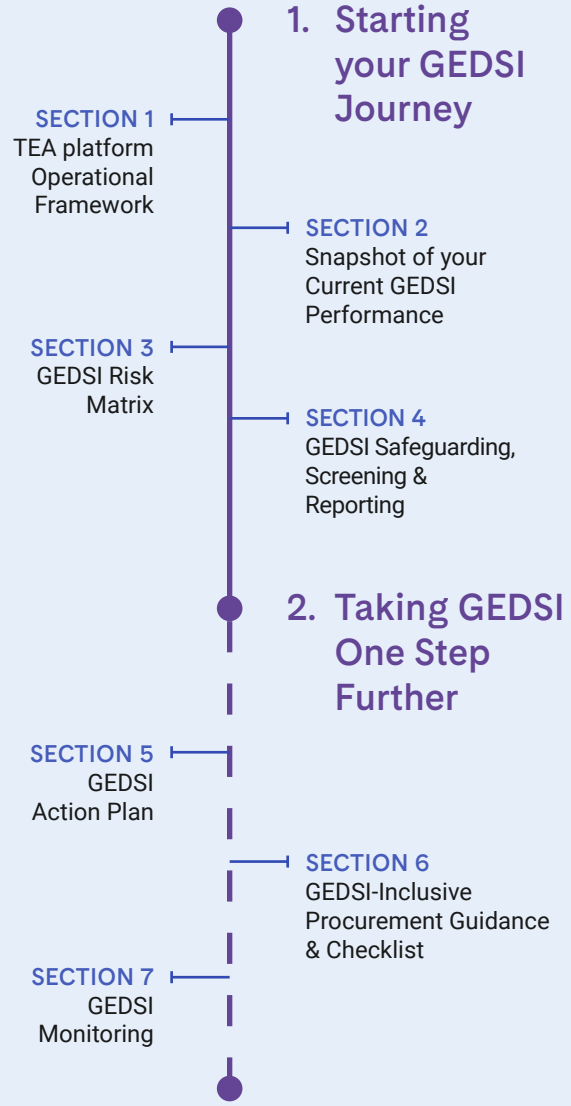
2 **You can modify the tools in excel, adjust data collection methods, and customise formatting** to align with your project objectives. This flexibility allows you to tailor the tools to best suit your needs while ensuring robust implementation of GEDSI measures throughout your project lifecycle in the TEA platform.

Suggested Approach for Using Tools

These tools, while optional, are highly recommended to support a robust approach to GEDSI in your project and can help you complete your mandatory reporting to Carbon Trust. In the case of questions, please consult the TEAadmin@carbontrust.com to identify which of these tools are relevant to your project.

We have structured these tools as per those that will set the foundation for getting started with GEDSI on the TEA platform, and then tools that will allow you to take GEDSI one step further.

1. **Starting your GEDSI Journey** provides the foundations for a strong approach to GEDSI within the TEA platform. These tools are mainly focused on assessing where you are at in terms of GEDSI and setting up the basics in terms of risk mitigation and safety for all. For those partners who must complete reporting, these tools feed into these reporting requirements.
2. **Taking GEDSI one step further**, shares 3 sections that allow you to go one level deeper in your approach to GEDSI. The tools in these sections focus on more specific areas such as procurement and monitoring. Please discuss with the TEA platform which tools are applicable for your project. The GEDSI Action Plan can form a core part of a strong approach, by clearly laying out the steps, responsibilities and timeline for your overall GEDSI vision.



Get started by completing the operational framework tool, to ensure your project aligns with the TEA platform´s principles and any applicable reporting requirements to your project. You can then complete any or all of the following tools in Sections 2-4 to set your organisation up for success in your GEDSI journey. You can consult with the TEA platform team through TEAadmin@carbontrust.com to identify which tools are applicable to your organisation.

Advance GEDSI beyond the basics by assessing your current GEDSI status and setting concrete, actionable steps to advance your GEDSI goals. With your baseline measured and an action plan in place, you can also begin to incorporate GEDSI into your monitoring processes by collecting and disaggregating data across different relevant social groups to your project. Finally, through the broad collection and analysis of GEDSI data by TEA partners, you can contribute to building the field of GEDSI within energy access ecosystems.

SECTION 1:

TEA platform Operational Framework

QUICK NAVIGATION: SECTION 1

What are the tools in this section?

This section contains one tool, located in the Tools Template Spreadsheet. It includes both highly recommended actions on the TEA platform and some additional actions for those who wish to advance further on GEDSI. The framework can be used as a tracker or gap assessment tool for users to assess whether their project design and implementation phase meets best practices. It also provides the opportunity for the user to identify areas where assistance may be required and prompts the user to communicate these needs to the TEA platform management team at TEAadmin@carbontrust.com. Please note that this tool presents recommendations related to gender and disability, yet across all areas, the TEA platform encourages you to expand this to include other social and excluded groups, where relevant and viable for your project. Definitions for key terms used in this section are located at the beginning of this document, in the Key Terms & Concepts section.

WHEN SHOULD I USE THIS TOOL?

Starting your GEDSI Journey

USES OF THIS TOOL

Planning

Gap Measurement

WHO IS THIS TOOL FOR?

This tool can be used by project managers or Monitoring, Evaluation, and Learning (MEL) team members of TEA platform projects.

HOW OFTEN SHOULD THIS BE UPDATED?

This tool should ideally be updated on a quarterly basis.

How to use the TEA platform Operational Framework

The tables within the Operational Framework, located in the Tools Template Spreadsheet, are organised as two distinct tables for enhancing GEDSI. This begins with actions which are highly recommended and then continues with additional actions to build on these. You could expand beyond tracking gender and disability inclusion to include other relevant social groups, such as youth under 25 years old, older people over 60 years old, and excluded communities, where applicable and feasible for your project's context.

Step 1: Assess project alignment

Evaluate how your project aligns with the GEDSI recommendations set out in the table. Identify areas where your project is aligned with these actions and where further actions may be needed.

Step 2: Identify gaps

Track your project's progress against the GEDSI recommendations and identify gaps where additional measures or support may be necessary.

Step 3: Identify any areas where you require support

You can use the tool to identify specific areas where assistance may be required to strengthen GEDSI within your project. This could include skills development, resource allocation, or internal organisational policy adjustments. Get in touch with the TEA platform team to communicate these needs and establish a way forward.

Step 4: Take action

If you wish to take GEDSI one step further, you can use this completed framework as a baseline or inputs for the development of a GEDSI Action Plan (see section 5), and accompanying Monitoring Framework (see section 7). For instance, the actions flagged as not included in design, can form part of your action plan, creating a plan that responds to gaps identified using this baseline tool. You can also go one step further and build on this framework, completing a detailed self-assessment using the tools in section 2.

Step 5: Monitor and report progress

Continuously monitor the progress of GEDSI integration within your project. You can share achievements and challenges related to GEDSI with the TEA platform management team and with the broader ecosystem. Communicating your GEDSI impacts broadly has the potential to improve your brand recognition, increase employee satisfaction, and make you more attractive to funders and other potential partners.

SECTION 2:

Snapshot of your Current GEDSI Performance

QUICK NAVIGATION: SECTION 2

What tools are in this section?

This section includes two tools: a survey and a checklist that TEA partners can complete in order to delve deeper into their current GEDSI strengths and gaps. It is intended to help you identify some potential starting points for applying a GEDSI lens. Definitions for key terms used in this section are located at the beginning of this document, in the Key Terms & Concepts section.

WHEN SHOULD I USE THESE TOOLS?

Starting your GEDSI journey

USES OF THESE TOOLS

Evaluation

Gap measurement

WHO ARE THESE TOOLS FOR?

These tools can be used by project managers of TEA platform projects. In general, it is recommended that every organisation appoint a GEDSI Lead, who should drive implementation of the tools in this section. Additionally, key stakeholders from relevant departments will need to be consulted, such as Human Resources; Marketing and Sales; Supply Chain and Distribution, Procurement, and Research & Development.

HOW OFTEN SHOULD THIS BE UPDATED?

These tools should be completed on an annual basis, and used as a benchmark or baseline to measure progress.

How to use the GEDSI Snapshot tools

This section consists of two tools:

2.1 Value for Women's Gender Smart Nexus GESI Survey, which looks at your institution's current business practices with a Gender Equality and Social Inclusion (GESI) lens; and

2.2 Support Services Checklist, which looks at the support you provide to downstream partners with a GEDSI lens.

TOOL 2.1: Undertake the Gender Smart Nexus GESI survey

Register and complete the Gender Smart Nexus GESI Survey to receive an automated report. The report will highlight strengths and opportunities related to GESI which can be shared internally, with senior leadership, or externally with relevant partners or stakeholders. Note that the survey is on a third-party website, and the report will be confidential. Additional information on confidentiality can be found on the next page.

Note: the survey is referred to as a "GESI Survey" rather than a "GEDSI Survey," because, in its current form, it primarily focuses on gender and social inclusion. It is not designed as a disability inclusion tool, but touches on these topics as part of social inclusion. Disability inclusion self-assessment tools can be found in the resources below.

TOOL 2.2: Use the Support Services Checklist

Conduct a rapid GEDSI assessment of your current or planned support to downstream partners using this checklist. The checklist will help you identify the entry points to include a GEDSI lens in the support you provide.

TOOLS IN THIS SECTION

2.1 Gender Smart Nexus Survey

Value for Women's Gender Smart Nexus GESI Survey can be used by an organisation to assess its GESI business practices, identify opportunities to become more inclusive, and establish a baseline to track progress. Upon completing the survey, the user receives an automated report highlighting strengths and opportunities related to GESI and business, which can be shared internally with senior leadership, or externally with relevant partners or stakeholders.

CONFIDENTIALITY

The information provided through the survey will only be viewed by Value for Women (VFW). It will not be shared publicly. VFW may analyse and aggregate findings across multiple businesses completing the survey, but will not share any identifying information without obtaining further explicit and written consent from your business. You will have the opportunity to consent to have VFW use the data gathered through your responses to this survey and aggregate for trend and benchmark analysis. No names or identifying information will be shared about specific businesses with the public, and VFW will protect data in compliance with the Global Data Protection Regulation (GDPR).

The report includes:

- An overview of how the institution performs in terms of GESI across different business areas, ranging from overall intentionality and strategy, support services for women entrepreneurs, gender lens investing, sex-disaggregated data collection, and human resources.
- Tailored recommendations for next steps based on current activities, as well as the top 3 strategic business priorities.

To complete the Gender Smart Nexus GESI survey, follow the steps below.

1. **Sign up to the Gender Smart Nexus.** To take the survey you must first sign up and fill in your name, email and a password of your choice. Select the option (SME/investor) that is most appropriate for your organisation. Please note: intermediaries, support providers, and advocacy organisations are recommended to select the investor category.
2. **Verify your email address.** Upon sign up, you will receive a message with a confirmation link to verify your email. Please make sure to check your spam folder in case the message was filtered by your system.
3. **Complete the GESI Self-Assessment Survey.** Your responses will be saved automatically each time you advance to a new page, so you can log out and complete the survey at a later time if needed.
4. **Access your GESI Report.** To access your tailored GESI Report, please login using the email and password and go to the "Report" section in the menu and download your report.

2.2 Support Services Checklist

The support provided by TEA partners can be assessed to better understand preferences, interests, and needs across diverse segments of women, persons with disabilities, and members of excluded groups. With this assessment, support can be refined to ensure that downstream partners are equipped sufficiently to deliver energy access products and services that take into account the needs of women, persons with disabilities, and members of other excluded groups, to make sure that no one is left behind.

The checklist to the right can help conduct a rapid assessment of current or planned support to downstream partners. **The goal of this checklist is to identify entry points to include a GEDSI lens in the support you provide.** Unlike Tool 2.1 (the Gender Smart Nexus Survey), which assesses your operations in their entirety, this checklist is focused on the specific support you provide to downstream partners in your projects. After completing this checklist, you can use the data in it to develop an action plan (see Section 5) for providing GEDSI-inclusive support to your downstream partners.

KEY ASSESSMENT QUESTIONS	YES	NO	N/A	COMMENTS
Does the organisation use disaggregated data in decision-making to develop and adjust the support provided to downstream partners?				
If yes, then:				
Does the organisation have time-bound and measurable goals and targets related to GEDSI?				
Can the organisation identify the impact of its work on outcomes for women, persons with disabilities, and members of other excluded groups, as leaders or employees of energy access companies?				
Can the organisation identify the impact of its work on outcomes for women, persons with disabilities, and members of other excluded groups, as customers and end users of energy access products?				
Can the organisation identify the impact of its work on outcomes for women, persons with disabilities, and members of other excluded groups, as suppliers or distributors of energy access products?				
Are there specific services offered by the organisation targeting women, persons with disabilities, and members of other excluded groups?				
If yes, then:				
Were these services developed in response to barriers (e.g. physical, communication, digital) faced by women or/and people with disabilities, or/and other excluded groups?				
Were these services developed in response to an understanding of the needs of women, persons with disabilities, and members of other excluded groups?				
Were these services developed in response to market research that asked women, persons with disabilities, and members of other excluded groups about their needs and challenges?				

2.2 Support Services Checklist

KEY ASSESSMENT QUESTIONS	YES	NO	N/A	COMMENTS
Are there specific services offered by the organisation targeting women, persons with disabilities, and members of other marginalised groups?				
If yes, then:				
Were these services developed in accordance with national or international best practices for supporting the needs of women, persons with disabilities, and members of other excluded groups?				
Have client-facing staff been trained on how to deliver these services?				
Is there a specific budget allocated for the delivery of these services?				
Is there any internal training material available that focuses on GEDSI?				
If yes, then:				
Have staff who interact with your downstream partners been trained on GEDSI in the past?				
Are staff who interact with your downstream partners regularly trained regarding how bias can impact product/service delivery for women, persons with disabilities, and members of other excluded groups?				
Does the organisation have a formal and accessible process to receive feedback from women, persons with disabilities, and members of other excluded groups and make project improvements based on this feedback?				

GDI Hub

I want to know more!

Check out these additional resources on conducting GEDSI self-assessments:

RESOURCE	DESCRIPTION
Women's Empowerment Principles Gender Gap Analysis Tool	A business-driven tool designed to help companies from around the world assess gender equality performance across the workplace, marketplace, and community.
2X Assess	A tool for assessing your eligibility for gender-lens investment from 2X Challenge signatories.
ILO Global Business and Disability Network (GBDN) Charter Self-Assessment Tool	A tool to assess commitments and performance of any business to promote disability inclusion.

SECTION 3:

GEDSI Risk Matrix

QUICK NAVIGATION: SECTION 3

What tools are in this section?

This section contains one tool, located in the Tools Template Spreadsheet. The TEA platform recommends a GEDSI-focused risk assessment to be done at the outset of the project, to inform the design and implementation phases of the project. The tool includes guidance to support this exercise. The guidance and examples are not exhaustive and users should apply their minds in assessing risks and planning mitigation (please also see the Section 1: GEDSI Operational Framework for additional support and considerations). The risks identified in this matrix can inform the development of a risk register, which is required by the TEA platform. Definitions for key terms used in this section are located at the beginning of this document, in the Key Terms & Concepts section.

WHEN SHOULD I USE THESE TOOLS?

Starting your GEDSI Journey

USES OF THESE TOOLS

Risk Mitigation

Reporting

WHO ARE THESE TOOLS FOR?

This tool can be used by risk/ operations personnel or/and project managers for TEA platform Projects.

HOW OFTEN SHOULD THIS BE UPDATED?

This tool would ideally be updated on a quarterly basis, aligned with TEA reporting.

Useful Terms for Section 3 (GEDSI Risk Matrix)

Risk — An uncertain event or condition that, if it occurs, has a negative effect on a project's objectives (scope, schedule, cost, and quality).

Risk mapping — The process of identifying and visualising potential risks that could impact a project. This involves brainstorming with stakeholders to capture various risk scenarios.

Risk categorization — The classification of identified risks into specific categories based on their nature, impact, and likelihood. This helps in prioritising risks and developing mitigation strategies.

Mitigation strategy — Actions or plans developed to reduce the likelihood or impact of identified risks. Mitigation strategies are tailored to the specific risks and organisational context.

MEL (Monitoring, Evaluation, and Learning) — A systematic approach to track project progress, evaluate outcomes, and incorporate learning into future project cycles. MEL helps in assessing the effectiveness and impact of project activities.

Subcontractors — Third-party entities or individuals contracted to perform specific tasks or services as part of a larger project. Effective risk management includes assessing and mitigating risks associated with subcontractors' activities.

Risk matrix — A tool used to visualise and assess the severity and likelihood of risks. It typically includes columns for risk description, category, impact, likelihood, and mitigation strategies.

How to use the GEDSI Risk Matrix tool

Step 1: Map risks

The first step involves identifying the expected project-related risks using the GEDSI Risk Matrix Tool in the Tools Template Spreadsheet. To do this, you can draw inspiration from the examples on column B of the Matrix and adjust or create your own. You may consider a collaborative mapping exercise with your team, project beneficiaries and/or subcontractors. Please see some examples in the section on resources below.

Please note: the examples shared are indicative and won't apply exactly to all projects, your final risk matrix should include original risks or examples adjusted from this list.

Step 2: Categorise risks

To fill column C-E of the matrix, you will identify which category the risk falls under and estimate the impact and likelihood of the risk. You can use the drop downs and accompanying key to do this.

Step 3: Identify mitigation strategy

Using the examples in column F, and mapping with your team and project participants, select which mitigation strategy is suitable for the risk identified. You may adjust examples or create your own strategy, depending on the risk and your organisation's processes and resources.

Step 4: Assess residual risk

After identifying and applying a mitigation strategy, you need to evaluate the effectiveness of the strategy in reducing the risk. Column H will help you assess how much the likelihood of the risk has been reduced by the mitigation strategy. Use the dropdown and accompanying key to select the appropriate likelihood rating. Column I will help you evaluate how much the impact of the risk has been reduced by the mitigation strategy. Use the dropdown and accompanying key to select the appropriate impact rating.

By completing these columns, you can determine the residual risk level after mitigation and decide if further actions are necessary to manage the risk effectively.

As you implement identified mitigation strategies, you can integrate this into a GEDSI Action Plan (section 5). Integrate these strategies into project design and operational processes to actively address identified risks. Establish robust monitoring mechanisms to track the progress and effectiveness of implemented strategies, ensuring continuous review and adjustment based on ongoing assessments and feedback to enhance project outcomes.

Roam, Kenya 2023 - PREO

I want to know more!

Check out these additional resources on risk management:

RESOURCE	DESCRIPTION
International Committee of the Red Cross (ICRC) Safer Access- Assessment and Planning Tool	An assessment and planning tool to increase acceptance and security in order to increase access to those in need in sensitive and insecure contexts, including armed conflict and internal disturbances and tensions.
International Finance Corporation (IFC) Risk Assessment Tool	A tool for assessing the probability of project-induced in-migration (an inflow of migrants into a project's area of influence).
UNDP ERM Guide	This guidance note aims to clarify UNDP's approach to Enterprise Risk Management (ERM) in practical terms. It is intended for both programming and operational staff to ensure a shared understanding of UNDP's risk management methodology across all levels and types of risk.

SECTION 4:

GEDSI Safeguarding, Screening and Reporting

QUICK NAVIGATION: SECTION 4

What tools are in this section?

This section provides three key tools related to prevention, screening and reporting on incidents of sexual exploitation, abuse, harassment and gender-based violence: a safeguarding checklist, a sample code of conduct, and a reporting template. TEA partners can use the tools in this section to self-assess, screen and report internally, as well as apply these to their work with subcontractors, where relevant. This is not an exhaustive list of tools and mechanisms required for a strong and effective approach to safeguarding. These should be used in conjunction with a strong policy and practices around mitigation, response, referral, awareness and advocacy.

WHEN SHOULD I USE THESE TOOLS?

Starting your GEDSI Journey

USES OF THESE TOOLS

- Risk mitigation
- Reporting
- Gap assessment

WHO ARE THESE TOOLS FOR?

These tools comprise templates for an effective approach to safeguarding excluded groups. GEDSI safeguarding is highly recommended to partner organisations and subcontractors engaged on the TEA platform or working on TEA-funded projects.

They are particularly applicable to organisations assessed as having contact with, or working with children under age 18, young people ages 15-24, people with disabilities or ethnic minorities. Additionally, for projects, processes, activities, and advocacy that may impact particularly vulnerable groups (as defined in 'Useful Terms for Section 4' below.

HOW OFTEN SHOULD THIS BE UPDATED?

Tool 4.1, the safeguarding checklist, can be used at any time, to assess any gaps in safeguarding procedures in your organisation or during the contracting process of new subcontractors. Tool 4.2, the sample code of conduct,can be used when onboarding and training new team members or contracting new partners with direct contact with project participants. Tool 4.3, the reporting template can be used when an incident has occurred and you wish to file a report.

Useful Terms for Section 4 (GEDSI Safeguarding, Screening and Reporting)

Abuse — Physical, sexual, emotional, economic or psychological actions or threats of actions that influence another person. This includes any behaviours that frighten, intimidate, terrorise, manipulate, hurt, humiliate, blame, injure, or wound someone.

Exploitation — The act of taking advantage of something or someone, in particular the act of taking unjust advantage of another for one's own benefit (e.g. sexual exploitation, forced labour or services, slavery or practices similar to slavery, or servitude).

Sexual abuse — Any actual or attempted abuse of a position of vulnerability, differential power or trust for sexual purposes, including profiting monetarily, socially or pollitically from the sexual exploitation of another. [1]

Sexual exploitation — The actual or threatened physical intrusion of a sexual nature, whether by force or under unequal or coercive conditions. All sexual activity with children sexual abuse, regardless of the age of maturity or consent locally. Mistaken understanding of the age of a child is not a defence.

Safeguarding — The set of responsibilities, preventative, responsive and referral measures that we undertake to protect vulnerable groups of people, ensuring that no-one is subject to any form of harm as a result of their association with the TEA platform. This includes ensuring that their contact with us and those associated with us and/or their participation in our activities, interventions and operations is safe. Where there are concerns over someone´s welfare or where a person has been subject to violence, appropriate and timely actions are taken to address this and incidents are analysed so as to ensure continued learning for the TEA platform.

Violence against vulnerable groups/people — This includes all forms of physical or mental violence, injury or abuse, neglect or negligent treatment, emotional ill-treatment or psychological violence, sexual abuse and exploitation, harassment, and commercial or other exploitation of a person. Acts of violence can also take place online through, for example, the internet, social media or mobile phones. It may be an intentional act involving the use of physical force or power or it may be failing to act to prevent violence against a person. Violence consists of anything which individuals, groups, institutions or organisations do or fail to do, intentionally or unintentionally, which either results in or has a high likelihood of resulting in actual or potential harm to the person's wellbeing, dignity and survival and development.

Vulnerable groups and people — Any person (child or adult) who may be restricted in capacity to guard themselves against harm or exploitation or to report such harm or exploitation. This specifically includes but is not limited to: children, young people and people with disabilities.

1 IFC. "Supporting Companies to Develop and Manage Community-Based Grievance and Feedback Mechanisms Regarding Sexual Exploitation, Abuse and Harassment." IFC. 2022.

How to use the GEDSI Safeguarding, Screening and Reporting tools

Tool 4.1: Checklist (Prevention).

You can take appropriate measures to manage safeguarding risk factors and prevent abuse and exploitation before it occurs. This tool is a checklist, which provides a list of minimum standards for all partners or subcontractors and aims to be a quick reference document to screen potential or current partners. You can accompany the checklist with other prevention measures such as: completing the tools in this section and also mapping risks in the risk matrix tool (section 3). This will help you to understand current risks and potential mitigation strategies.

Tool 4.2: Code of Conduct (Screening).

You can apply detailed screening procedures for all personnel (including unpaid volunteers) who will come into contact with children, young people, people with disabilities and other vulnerable groups (directly or indirectly). There are various ways for you to conduct screening, one of these is the completion of a Code of Conduct, which is included as Tool 4.2. The Code of Conduct is a tool that you can use with any team members – from TEA Partner organisations and sub-contractors – who have direct contact with vulnerable groups. Best practice is to accompany this with a police reference check or equivalent, a detailed application and interview process, and references who support the applicant's suitability to work with vulnerable groups.

Tool 4.3: Reporting.

You can establish confidential and diverse mechanisms that enable the safe reporting of safeguarding concerns. These may include the use of a reporting-only WhatsApp number managed by one or two trained focal points, a dedicated email account, accompanied by a formal written report. A sample formal report is provided for partners or subcontractor team members to use to report any incident or concern. This tool contains two parts. The first part should be completed by the person reporting the incident, whilst the second is to be completed by elected trained focal points within the relevant organisation. Ideally, you should accompany this form with a monitoring and follow up procedure. Additionally, you should establish a clear referral pathway that taps into local health, legal and psychosocial resources.

TOOL 4.1:

Safeguarding checklist for contractors and subcontractors

Description:

This checklist contains the minimum standards recommended where your project/activity includes contact with, or working with vulnerable groups, to make an assessment of your safeguarding/protection policy and procedures.

If you currently do not meet all of the minimum standards, this checklist can be used to support the development of a capacity building plan to align with best practices.

Name of contractor/subcontractor:

Date checklist is completed:

Name of person completing checklist:

MINIMUM STANDARDS	YES/NO/IN PROGRESS/I DON'T KNOW	NEXT STEPS
A written safeguarding policy is in place that is subject to regular review, at least every 5 years. This policy includes stating standards of conduct, including acts of sexual exploitation and abuse towards vulnerable groups, from misconduct or malpractice, including both in-person and online.		
The policy is accompanied with a work plan to implement the policy is in place.		
The policy or/and standards of conduct have been shared with current staff at all levels of the organisation on repeated occasions (such as inductions and trainings).		
The partner's policy includes a commitment to preventing a person working with vulnerable groups if they pose an unacceptable risk to them.		
The policy or/and standards of conduct have been shared with current staff at all levels of the organisation on repeated occasions (such as through inductions and trainings).		
Partner has a process in place to share the policy with children,vulnerable adults and caregivers, in a child friendly, inclusive and accessible format.		
A Safeguarding Code of Conduct that outlines safe and professional behaviour with vulnerable groups and use of their images for work-related purposes is in place. It is signed by all personnel and subcontractors with contact with vulnerable groups		
Internal reporting procedure for abuse and exploitation allegations, Code of Conduct and Policy breaches in place.		
Partner creates a safe and trusted environment and an organisational culture that prioritises safeguarding, so that it is safe for those affected to come forward, and to report incidents and concerns with the assurance they will be handled sensitively and properly.		
Partner provides safeguarding/protection training for personnel.		

MINIMUM STANDARDS	YES/NO/IN PROGRESS/I DON'T KNOW	NEXT STEPS
Partner creates a safe and trusted environment and an organisational culture that prioritises safeguarding, so that it is safe for those affected to come forward, and to report incidents and concerns with the assurance they will be handled sensitively and properly.		
Partner provides safeguarding/protection training for personnel.		
Trained department or focal points have overall responsibility for the development and implementation of the safeguarding policy and activities. This focal point or department heads report directly to senior leadership and safeguarding is part of their job description.		
Partner has safe recruitment and screening processes for all personnel in contact with children, people with disabilities and other vulnerable groups, including criminal record checks and verbal referee checks.		
Partner has additional screening measures such as targeted safeguarding interview questions, when candidates are applying for positions that involve working with vulnerable groups.		
Partners' employment contracts contain provisions for suspension or transfer to other duties of any employee who is under investigation and provisions to dismiss any employee after an investigation.		
Partner undertakes risk assessment to reduce the risk of people being harmed as a result of operations or activities.		
Partner has effective communication in place between the field and HQ around the expectations of the safeguarding policy.		
Partner has a community-based complaints mechanism, including: written guidance on survivor support and regular monitoring and review processes.		
Partner has conducted a mapping exercise of local child/vulnerable adult protection services and has a referral process in place, if an incident occurs.		
Where applicable, partner has comparable safeguarding minimum standards for any downstream partners it engages on TEA-funded programs/projects.		

TOOL 4.2:

Code of Conduct

Description:

This tool is a template for a code of conduct that each partner organisation may choose to request personnel or subcontractors to sign, as part of their induction and/or contracting process. The code of conduct aims to ensure that their personnel or those of subcontractor organisations avoid any behaviour or conduct that compromises the safety and protection of children[1], young people[2], persons with disabilities and other vulnerable groups within its activities, operations and projects.

1 "Child," in line with the United Nations Convention on the Rights of the Child, and for the purposes of this policy, is defined as any person — girl, boy, young woman, young man, and children of other gender identities — under the age of 18 years (UNCRC Article 1).

2 "Young Person/People" or "Youth," in line with United Nations definitions and for purposes of this policy, include individuals – young women, young men, and young persons of other gender identities – aged 15–24 years old. This group spans the categories of 'children', 'adolescents' and 'adults' but regards young people as having particular safeguarding needs and requiring distinct consideration aside from younger children and older adults.

Safeguarding Code of Conduct

The TEA platform is committed to creating a safe environment for vulnerable groups, including but not limited to: children, young people, and people with disabilities. All staff and partners have a duty to commit to maintaining an environment that prevents violence against all people. Further to this, sexual exploitation and abuse by staff constitute acts of gross misconduct and are therefore grounds for termination of employment.

1. As such, I agree that I will:

- Be open and honest in my dealings with vulnerable people, their families, and communities participating in projects, processes, public-facing pieces of communication, events, and activities.
- Treat all people in a manner which is respectful of their rights, integrity, and dignity and considers their best interests regardless of age, sex, gender, sexual orientation, nationality, ethnic origin, colour, race, language, religious or political beliefs, marital status, disability, physical or mental health, family, socio-economic or cultural background, class, or any history of conflict with the law.
- Create and maintain an environment which prevents the abuse and exploitation of all people ensuring that I am aware of potential risks with regards to my conduct and work, and take appropriate action so as to minimise risks to vulnerable people.

- Contribute to building an environment where all people we engage with are:
  - respected and able to participate in and discuss decision-making and interventions into their safeguarding in accordance with their age, maturity, abilities and evolving capacities;
  - well informed of their safeguarding and protection rights and what to do if they have a concern.
- Comply with all relevant international standards and local legislation in relation to child labour, and refrain from using children and young people aged under 18 years or other vulnerable people for domestic or other labour, if such work is inappropriate, exploitative or harmful given their age or developmental capacity, which interferes with their time available for education and recreational activities, or which places them at significant risk of injury, exploitation, or violence.
- Respect the privacy and confidentiality of all people associated with your project on the TEA platform. This means I will:
  - Never ask for or accept personal contact details or invitations to share personal contact details (this includes email, phone numbers, social media contacts, address, Zoom, WhatsApp etc.) from any child, vulnerable person or family associated or formerly associated with our work or share my own personal contact details with such individuals except where this has been explicitly authorised by the TEA platform and/or for business purposes;
  - Not share my own personal contact details with such individuals except where this has been explicitly authorised by the TEA management team and/or for business purposes;
- Never share my own personal contact details with such individuals except where this has been explicitly authorised by the TEA platform and/or for business purposes;
  - Never disclose, or support the disclosure of, information that identifies families, children and/or vulnerable people that directly benefit from projects on the TEA platform, through any medium, unless that disclosure is in accordance with standard policies and procedures and/or has the explicit consent of the TEA management team;
  - Never make any direct contact with a child, young person or vulnerable person associated with a project on the TEA platform that is not supervised by a (or another) member of staff or partner staff, or designated community member. Such contact may include but is not limited to visits and any form of communication via social media, emails, and letters;
- Report and respond to any concerns, suspicions, incidents or allegations of actual or potential abuse to a vulnerable person in accordance with the relevant reporting and responding mechanisms;
- Cooperate fully and confidentially in any investigation of concerns or allegations of abuse to vulnerable people; and
- Immediately disclose all charges, convictions, and other outcomes of an offence, which occurred before or during association with a project on the TEA platform that relates to the exploitation and abuse of a vulnerable person.

2. I will not:

- Abuse or exploit anyone or behave in any way that places a person at risk of harm, including through harmful traditional practices such as, for example, female genital mutilation, forced or child marriage;
- Engage in any form of sexual activity or develop physical/sexual relationships with anyone under 18 regardless of the age of consent locally, or with a vulnerable person. Mistaken belief in the age of a child or vulnerability of a person is not a defence;
- Hit or in any way harm or use physical punishment/discipline or use of physical force of any kind towards vulnerable people and others;
- Use language or behave towards a vulnerable person in a way that is inappropriate, offensive, abusive, sexually provocative, demeaning or culturally inappropriate in that context;
- Fondle, hold, kiss, hug or touch vulnerable people and others in an inappropriate or culturally insensitive way;
- Have a vulnerable person with whom I am in contact in a work-related context, stay overnight at my home or any other personal residential location or accommodation;
- Sleep in the same room or bed as a vulnerable person with whom I am in contact in a work-related context. Where it is necessary to sleep close to unaccompanied vulnerable people, I will make sure that another adult is present and it is in line with authorised procedures;
- Do things of a personal nature for vulnerable people, with whom I am in contact in a work-related context, (e.g., taking a child/young person/person with a disability to the toilet/bathroom; helping them get un/dressed etc.) that they can do for themselves;
- Spend time alone away from others with vulnerable people with whom I am in contact in a work-related context; I will always make sure that another adult is with me and/or I am with the vulnerable person in an open public place, where others are around and in plain view of others;
- Act in ways that shame, humiliate, belittle or degrade vulnerable people, or otherwise perpetrate any form of emotional abuse;
- Develop relationships with, engage in any practice with or develop behaviour towards vulnerable people which could in any way be deemed or interpreted as exploitive or abusive;
- Condone or participate in behaviour in our projects which are illegal, unsafe, or abusive;
- Use any computers, mobile phones, video and digital cameras, or any such medium to monitor, exploit, harass or bully vulnerable people; or to access, view, create, download, or distribute pornography, especially abusive images of vulnerable people and others.

The above is not an exhaustive list. Staff, partners, contractors and community members should consider all related actions and behaviours which may compromise the rights and safeguarding of vulnerable people.

Personal Conduct outside Work or Engagement with The Organisation

The organisation asks that everyone signing this Code of Conduct considers how actions outside of working hours align with this Code of Conduct. As such, and due to the nature of our work and the consequences of any violations of this Code of Conduct, actions taken by project staff, volunteers, partners, suppliers, contractors and visitors outside of working hours that are seen to contradict this Code of Conduct will be considered a violation of this Code and may be subject to disciplinary action or termination of employment or work agreement.

ACKNOWLEDGEMENT

By signing below, you acknowledge that you have read, understood, and acknowledged this Code of Conduct.

Witness Signature

Name (Block Letters)

Date……/……/…….

Witness Name (Block Letters)

Date……/……/…….

TOOL 4.3:

Incident Reporting Form

Description:

You may complete this form if you believe that a vulnerable person has suffered abuse or exploitation, or a breach of the Safeguarding Code of Conduct may have occurred, or that someone´s safety is in danger. All safeguarding concerns should be reported immediately to **[Safeguarding Focal Point/Direct Manager/Other responsible party]**. The report must be treated in strict confidence.

Note: This form is confidential and should be stored appropriately, with access only to authorised and trained focal points.

TODAY'S DATE:	TODAY'S TIME:
Today's venue/address:	
Name of vulnerable person:	Age of vulnerable person: (if known)
Name of parents/guardians: (if known)	

1. **Is the vulnerable person in immediate danger or risk of harm? If yes, what steps have been taken to remove the person from harm?**

Description: Details of Concern / Suspicion / Incident for all internal and external safeguarding reports. Please fill out as many sections as possible with as much detail as you can. Please describe what happened: time/dates/names of persons involved/behaviour or signs observed/any other details:

2. **Details of any conversation with the vulnerable person (it is important only basic details are obtained from the vulnerable person. Personnel should not interview the affected person or conduct any type of investigation):**

3. Have you contacted anyone about this concern?

◯ ◯

Yes / No (Please circle one)

a. **If so, who have you contacted?**
Please add this information in the box on the right

Please sign this report and print your name and your position in the organisation.

Signed: Date:

Name: Position:

To be completed by Safeguarding Focal Point or Direct Manager

Name of person who received the report: **Date received:**

Internal Safeguarding Report

1. Name of personnel against whom the report is made: (include position and if relevant, name of partner organisation)

   a. Has this person signed the Safeguarding Code of Conduct and/or attended any relevant training? (include dates and other details)

   b. Has this person been notified of the report? Provide details.

2. Have the Focal Points been notified? Provide date and details.

3. What action has been taken to provide care and support to the vulnerable person and/or family/ guardian? Including medical attention, reporting to police, external referral and counselling.

4. Please detail any actions that have been taken including any immediate sanctions, discussion, meetings, HR outcomes or investigation steps:

5. Please list any relevant documentation for this investigation here, and attach them when submitting your report.

External Safeguarding Reports

Action taken including details of referral or external report made:

EXTERNAL REFERRAL OR REPORTING RECORD

Agency or service referred to:

Vulnerable person and/or family referred to:

Name and position of person spoken to: Date of referral or report:

Details of action to be taken by agency or service:

Date when this information was provided to vulnerable person and/or family/guardian:

Any other details:

Any follow up required:

Signature and name or person who has dealt with report:

……

Imara Tech, Tanzania, 2021 – PREO

I want to know more!

Check out these additional resources:

RESOURCE	DESCRIPTION
Oxfam resource bank	A number of resources including child and young people safeguarding policies, code of conduct and an outline of the procedures taken at Oxfam.
Child Safeguarding Toolkit, UNICEF	A detailed toolkit on child safeguarding, designed for businesses to implement a comprehensive approach. This step-by-step guide will show you how to identify and prevent risks to children who interact with your business.
Safeguarding Vulnerable Groups Act, UK Government	Current legislation from the UK government on safeguarding all vulnerable groups, including children and vulnerable adults.
Women and Young Persons with Disabilities: Guidelines for Providing Rights-Based and Gender-Responsive Services to Address Gender-Based Violence and Sexual and Reproductive Health and Rights for Women and Young Persons with Disabilities	A practical guide to provide inclusive and accessible services related to gender-based violence (GBV) and sexual and reproductive health and rights (SRHR) for women and young persons with disabilities.

SECTION 5:
GEDSI Action Plan

QUICK NAVIGATION: SECTION 5

What tools are in this section?

This section contains one tool, available in the Tools Template Spreadsheet. This tool, and action plan template, can support TEA Partners to prioritise and plan GEDSI actions. It contains two key components, both of which are housed in the accompanying excel:

i. a tracker for various steps involved in developing a GEDSI Action Plan

ii. a template for planning activities in detail, including the sub activities to be undertaken, timelines and ownership of actions

PLEASE NOTE: while this template can provide a framework for prioritising and planning actions, you may modify it as best suits your context/needs.

WHEN SHOULD I USE THIS TOOL?

Taking GEDSI one step further

USES OF THIS TOOL

- Planning
- Reporting
- Gap assessment

WHO IS THIS TOOL FOR?

This tool can be used by an appointed GEDSI Lead, project manager or/and MEL team members of TEA platform projects. Whilst an appointed GEDSI Lead may lead the development of this action plan, senior leadership should be involved in approving the activities.

HOW OFTEN SHOULD THIS BE UPDATED?

This tool doesn't require updating but can be used when an action for intervention is identified and needs planning.

How to use the GEDSI Action Plan

Step 1: Understand the process

It is important for you to understand the various steps involved in developing a GEDSI Action Plan. These steps are categorised into three stages which include preparation, design and implementation. The tracker included in the tool summarises each of these stages, alongside allowing you to update the status of each step once completed.

Step 2: Consider your baseline assessment and identify actions

Leverage findings from your baseline assessment Section 2 as your starting point to identify the actions you will plan and implement. These actions can be determined from the needs and opportunities revealed by your Gender Smart Nexus survey results and the Support Services Checklist. Indicators listed in Section 7 can also be used as a reference to identify actions that speak to them.

Step 3: Align with the operational framework

Refer to the operational framework (Section 1) to track your progress with GEDSI on the TEA platform. Actions identified by you should align with the commitments and the highly recommended actions outlined in the operational framework along with other optional actions included in the framework.

Step 4: Plan implementation of action

The template included in the tool will support you to plan the implementation of your priority actions. It can be used to list the sub-activities to be undertaken, alongside timelines and indicators to be tracked. It also allows you to designate different individuals responsible for a sub-activity.

GUIDANCE

High-Level Action Column B	This should capture the action that you will be undertaking in alignment with your GEDSI baseline using inputs from Section 2, as well as inputs from the operational framework (Section 1).
Target/Milestones Column B	This includes ***qualitative or quantitative goals of what you want to achieve*** through the implementation of the planned action.
Impact and/or Outcome Column E	This outlines the ***overall change*** that the planned action seeks to have.
Owner Column C	For those activities assigned to someone within your organisation, designate the individual who will be responsible for each action and step, or, where it is not possible to designate the individual, designate a role or department. For those activities that will be completed by an actor outside your organisation (i.e., suppliers, distributors, customers), designate the responsible organisation or group of people.
Indicators (as required) Column D	This lists ***what you will measure*** to track change, corresponding to your targets.
Output (as required) Column E	This should include any ***tangible product that may result as a part of the process***, such as reports, meetings and leaflets, which are useful in themselves but do not usually meet the full purpose of the process. These could correspond to only some activities and be included as required.
Status Column G	Use the drop-down menu to indicate the current status of each action and step. This can be updated regularly.
Timeline Column H - S	Tick the box for the month in which you intend to complete each step. The timelines can be adjusted as necessary, and you could consider using weeks instead of months if you are planning a shorter timeline.

SECTION 6:

GEDSI-inclusive Procurement Guidance & Checklist

QUICK NAVIGATION: SECTION 6

What tools are in this section?

The three tools in this section provide guidance on how to add a GEDSI lens to your procurement practices. They include an assessment of diversity among subcontractors, implementers, and grantees; a checklist for practices to implement to increase the representation of women, persons with disabilities, and members of other marginalised groups among subcontractors, implementers and grantees, and a self-assessment that subcontractors, implementers, and grantees can complete with a corresponding scorecard for partners to evaluate the self-assessments. Definitions for key terms used in this section are located at the beginning of this document, in the Key Terms & Concepts section.

WHEN SHOULD I USE THESE TOOLS?

Taking GEDSI a step further

USES OF THESE TOOLS

Risk mitigation

Gap measurement

Procurement

WHO ARE THESE TOOLS FOR?

These tools can be used by all team members engaged in procurement and reporting.

HOW OFTEN SHOULD THIS BE UPDATED?

These tools don't require updating but can be used every time you do procurement or for training/onboarding new team members.

Useful Terms for Section 6 (GEDSI-inclusive Procurement Guidance and Checklist)

Procurement – The selection of goods, services or civil work.

Implementers – Third-party entities or individuals contracted to implement project activities.

Subcontractors – Third-party entities or individuals contracted to perform specific tasks or services as part of a larger project.

Grantees – Third-party entities or individuals awarded funding through a partner and project.

How to use the GEDSI-inclusive Procurement Guidance & Checklist

Step 1: Understand and apply the procurement recommendations in the GEDSI Operational Framework

The TEA platform recommends that partners take certain steps to integrate GEDSI into their procurement processes. The highly recommended aspects include:

- Collect gender and disability (if available) disaggregated data on subcontractors (Operational Framework 1.2);
- Collect gender and disability (if available) disaggregated data on implementers and grantees (Operational Framework 1.3); and
- Integrate GEDSI principles into procurement and competition materials (Operational Framework 6.1-6.2).

Step 2: Map your current subcontractors, implementers, and grantees

Complete the GEDSI Contracts Tracker at Tool 6.1 in the Excel with information on your current subcontractors, implementers, and grantees. This will help you understand where women, persons with disabilities, and members of other marginalised groups are already represented.

Step 3: Take steps to diversify your subcontractors, implementers, and grantees

Refer to the Checklist: GEDSI-Inclusive Procurement Practices to learn what additional steps you can take to increase the representation of women, persons with disabilities, and members of other marginalised groups among your subcontractors, implementers, and grantees. Complete the highly recommended activities, take steps to go beyond the foundational level, complete those that are feasible for your organisation, and note when those steps are completed.

Step 4: Assess your subcontractors, implementers, and grantees

Ask your subcontractors, implementers, and grantees to complete a self-assessment, based on the Sample Self-Assessment Questions for Subcontractors, Implementers, and Grantees.

Step 5: Assess your subcontractors, implementers, and grantees

Evaluate your current or prospective subcontractors, implementers, and grantees to help inform your decision of who to contract with using the GEDSI Procurement Scoring Card.

TOOL 6.1:

GEDSI Contracts Tracker

This tool, available in the Tools Template Spreadsheet, helps you map your current procurement contracts, to understand where you are already contracting with women, people with disabilities and members of other excluded groups. Detailed instructions are found with the tool in the Tools Template Spreadsheet.

TOOL 6.2:

Checklist: GEDSI-inclusive Procurement Practices

There are several actions that you can implement to increase the representation of women, persons with disabilities, and members of marginalised groups among your subcontractors, implementers, and grantees. These actions are detailed in the checklist below.

STRATEGIC ACTIVITIES	STEPS TO IMPLEMENT THE ACTIVITIES	STATUS
Highly Recommended		
Establish a formal commitment to GEDSI in procurement	Update your procurement and competition materials to include the TEA GEDSI Principles and explicitly state your commitment to these principles. Communicate that subcontractors, implementers, and grantees are expected to adhere to these principles. Consider asking current and prospective subcontractors, implementers, and grantees to conduct a self-assessment.	○
Collect, analyse and use sex- and disability- (if available) disaggregated data for your subcontractors, implementers, and grantees	Collect sex- and disability- (if available) disaggregated data on the ownership and leadership of your current subcontractors, implementers, and grantees. As a starting point, you can use the GEDSI Contracts Tracker to understand the leadership and ownership of subcontractors, implementers, and grantees.	○

STRATEGIC ACTIVITIES	STEPS TO IMPLEMENT THE ACTIVITIES	STATUS
Set, monitor, and track gender- and disability-inclusive procurement indicators	Set explicit targets for gender and disability[1] inclusion among your subcontractors, implementers, and grantees and communicate this to employees and other stakeholders. Set indicators to ensure compliance with policies, measure progress, and to signal any necessary adjustments or improvements.[2]	○
Additional Actions		
Collect, analyse and use disaggregated data for your subcontractors, implementers, and grantees	Add whether or not a business is owned or led by members of other marginalised groups to your competition and procurement tender process. As a starting point, you can use the GEDSI Contracts Tracker to understand supplier leadership and ownership.	○
Set, monitor, and track GEDSI-inclusive procurement indicators	Set explicit targets for diversity and social inclusion in your supply chain and communicate this to employees and other stakeholders. Set indicators to ensure compliance with policies, measure progress, and to signal any necessary adjustments or improvements.[3]	○
Add GEDSI into your evaluations of prospective subcontractors, implementers, and grantees	Consider GEDSI factors in evaluating and selecting new subcontractors, implementers, and grantees.	○

1 As disability-disaggregated data on workforce representation among subcontractors, implementers, and grantees, these targets could be related to disability-inclusive processes, such as building partnership with Organisations for Persons with Disabilities, providing training on disability inclusion, etc.

2 Example indicators - which can be collected via self-assessment surveys - can include but are not limited to:
- % procurement spend with businesses owned or led by women
- % procurement spend with 2X compliant businesses
- % procurement spend with businesses with GEDSI commitments
- % workers in the supply chain receiving a living wage, disaggregated by sex.

3 Example indicators - which can be collected via self-assessment surveys - can include but are not limited to:
- % procurement spend with businesses owned or led by members of other marginalised groups
- % procurement spend with businesses with GEDSI commitments
- % workers in the supply chain receiving a living wage, disaggregated by sex.

TOOL 6.3A:

Sample Self-Assessment Questions for Subcontractors, Implementers, and Grantees

Give this questionnaire to your current or prospective subcontractors, implementers, and grantees to complete, and evaluate their responses. The instructions and Parts A and B are for your subcontractors, implementers, and grantees to fill in. The "For Procuring Organisation Only" section is for your evaluation of the subcontractors, implementers, and grantees.

Instructions

Prospective or current subcontractors, implementers, and grantees can complete the questionnaire below. The procuring organisation will subsequently evaluate all responses in accordance with the GEDSI Procurement Scoring Card to consider the selection of subcontractors, implementers, and grantees.

PART A - WORKFORCE

A1. How many people in total does the company employ?

A2. Please detail the company's workforce representation in the table below, disaggregated by sex, and by other diversity markers as relevant. If data is not available for fields on this form, you may indicate, "data not available."

Highly Recommended	
% of employees who are women	
% of senior managers (C-Suite and Director level) who are women	
% of employees who have disabilities (if available)	
% of middle managers who are women	
% of senior (C-Suite and Director level) and middle managers who have disabilities (if available)	
Additional Actions	
% of employees who are men	
% of employees who are youth (18-30)	
% of employees who are elderly (60+)	
% of employees who belong to an ethnic minority	
% of employees who are displaced persons	

A3. Does the company have any of the following policies or statements? ***Check all that apply and please attach copies:***

- ⊙ Nondiscrimination and Equal Employment Opportunities
- ⊙ Anti-harassment, violence, and sexual exploitation
- ⊙ Wage equity through paying equality for equal work, based on regular salary reviews
- ⊙ Disability inclusion and reasonable accommodation policy
- ⊙ Paid maternity leave beyond national regulatory requirements
- ⊙ Paid paternity leave beyond national regulatory requirements
- ⊙ General support to employees as parents and caregivers (e.g., flexibility, phased return to new parents, etc.)
- ⊙ Flexible work options (i.e., flexible hours or hours adjusted to needs)
- ⊙ Accommodations for nursing mothers such as breastfeeding/pumping spaces that are private, clean, safe, and available primarily for this purpose
- ⊙ Environmental
- ⊙ Health & Safety

A4. What are the normal weekly working hours for employees?

A5. Is overtime voluntary? ***Select one.***

- ◯ Yes
- ◯ Sometimes
- ◯ No
- ◯ Not applicable i.e., no overtime worked

A6. Is it paid at a premium rate? ***Select one.***

- ◯ Yes
- ◯ Time off in lieu given
- ◯ No
- ◯ Depends on employee

A7. What is the youngest age at which someone can be employed by the company?

A8. How do you ensure employees are aware of their rights? *Check all that apply.*

- ◯ Written contracts
- ◯ Email notifications
- ◯ Employee handbook
- ◯ Staff notice boards
- ◯ Inductions
- ◯ Other (please specify)

A9. Do you have SOPs in place that align with national, regional, or international standards for physical, digital, and communications accessibility?

- ◯ Yes
- ◯ No, but we plan to develop these in the next year
- ◯ No

A10. Describe any reasonable accommodation policies and processes you have in place.

PART B - OPERATING STANDARDS

B1. Does the company have any recognised Operational Standards for products supplied to [SOURCING COMPANY]? *Check all that apply.*

	Quality e.g., ISO9000	Environment e.g., ISO14001	Labour e.g., SA8000	Training e.g., Investors in People
Certified to	☐	☐	☐	☐
Working towards	☐	☐	☐	☐

Other standards

B2. Is there anyone designated as being responsible for health and safety issues for your company? *Select one.*

◯ Yes ◯ No

Please provide details below

B3. Did you carry out any Health & Safety risk assessments last year?
Select one.

◯ Yes ◯ No

Please provide details of the last risk assessment and key findings / recommendations actioned below

B4. Has the company had a labour standards audit carried out?
Select one.

◯ Yes ◯ No

Please provide details of the results of the last audit and key findings / recommendations requiring action below.

B5. [SOURCING COMPANY] has a stringent ethical supplier engagement policy, and therefore is sensitive to any possible links to high-risk commodities and practices.

Please provide evidence as to how your company meets standards regarding child labour, armaments, anti-bribery, corruption and anti-slavery. Please provide information below.

TOOL 6.3B:

GEDSI Procurement Scoring Card

In the Tools Template Spreadsheet, you will find a tool to score the self-assessment. Procuring organisations can fill in the Procurement Scoring Card's 'Column C' corresponding to responses submitted in the Self-Assessment Questions for Subcontractors, Implementers, and Grantees.

On the basis of the responses, the Scoring Card shall autogenerate an overall status categorised as "High Standard", "Acceptable", or "Unacceptable".

Procuring organisations can further complete the Card by filling in their overall remarks and including their signature.

GDI Hub

I want to know more!

Check out these additional resources:

RESOURCE	DESCRIPTION
Inclusive Supply Chains	Brief fact sheet on the benefits of inclusive supply chains.
SheWorks: Putting Gender-Smart Commitments into Practice	IFC report on implementing gender-inclusive supply chain practices.
Building Gender-responsive Procurement: Lessons from Research and Practice	Guidance note on gender-inclusive procurement.
How to identify as a disability-inclusive supplier in the UNGM registration?	The United Nations Global Market provides the option for suppliers to register themselves as a disability-inclusive supplier using this portal.
Disability:INclusive Workplaces – Accessible Technology Procurement Toolkit	Guide on choosing appropriate workplace digital tools to support applicants, suppliers, and employees, including those with disabilities.

SECTION 7:

GEDSI Monitoring and Indicators

QUICK NAVIGATION: SECTION 7

What tools are in this section?

This section contains one tool, located in the Tools Template Spreadsheet. It provides guidance on how to measure and disaggregate results by GEDSI markers (e.g., gender, disability, age, ethnicity). This tool can be used in conjunction with the operational framework and Gender Action Plan and support TEA partners to meet recommendations set out in the framework. Definitions for key terms used in this section are located at the beginning of this document, in the Key Terms & Concepts section.

WHEN SHOULD I USE THIS TOOL?

Taking GEDSI one step further

USES OF THIS TOOL

- Reporting
- Gap measurement
- Evaluation

WHO IS THIS TOOL FOR?

This tool can be used by MEL officers. It could also be used by project managers of projects on the TEA platform.

HOW OFTEN SHOULD THIS BE UPDATED?

This tool can be periodically updated according to set timelines, depending on any indicators that you may use for any reporting, where relevant and applicable to your project. This will usually vary between quarterly and annually, depending on your project and organisation.

Useful Terms for Section 7 (GEDSI Monitoring and Indicators)

Data collection frequency — The regular intervals at which data is gathered to ensure it is current and reflects ongoing trends or changes.

Indicators — Quantitative or qualitative variables that are used to measure progress towards achieving project objectives.

Stakeholders — Individuals or groups with an interest or investment in the project, including: beneficiaries, project teams, partners, and funders.

Social groups for data collection — The specific groups from which data is gathered, tailored to the project's objectives and the GEDSI indicators being measured.

Results measurement — The process of assessing and quantifying the outcomes of project activities, for this tool specifically in relation to GEDSI markers.

How to use the GEDSI Monitoring and Indicators Tool

Step 1: Define Project Objectives

Clearly outline your project objectives and identify which GEDSI indicators are relevant to your goals. Determine where data needs to be collected.

Step 2: Define social groups for data collection

Define or identify diversity markers or social groups that you will be collecting data or indicators on, as relevant to your project. For example: women versus men, women with disabilities, people experiencing poverty. Use the columns “data group 1” and “data group 2” to signify who you will be collecting data from. For example: if you are collecting data on jobs lost by women and men, you would choose women for one group and men for the second. Or if you are collecting data on younger women, you can choose women over 35 for data group 1 and women under 35 for data group 2. Note: you will not always need to fill all the columns and may just fill one if you are only collecting data on one target group.

Step 3: View and Select Key Indicators

Review the key indicators available in the tool. Select only those that are pertinent to your project’s needs and objectives. Below are some factors to consider in your selection of indicators:

1. Your project’s GEDSI goals e.g., if one of your project’s goals is to work with subcontractors that hire women in their teams, an indicator to measure would be “Percentage of women on subcontractor team.”
2. Project stakeholders’ priorities and information needs (beneficiaries, partners, and donors) e.g., if your project partners are interested in understanding your project’s impact on the economic resilience of youth, under 25 years old an indicator to measure could be “Number of economic opportunities created for youth under 25 years old.”’
3. Feasibility of collecting data for the chosen indicators, considering available resources, expertise, and data sources.
4. Rights and privacy of individuals, especially vulnerable groups (see the definition of “vulnerable groups” on page 24, Section 4) so as to do no harm. For more information on how to do so, please see additional resources on data privacy on page 63 and GEDSI Safeguarding on page 23.

Step 4: Set Data Collection Frequency

Determine the frequency of data collection, such as quarterly, semiannually or annually. Set regular intervals for data collection to ensure consistent and up-to-date information. Frequency for collecting certain indicators should, where possible, align with your organisation’s current reporting and data collection processes. You can also align your data collection to the different phases of your project (e.g., initiation, implementation, and completion), as well as any applicable TEA platform reporting requirements.

Imara Tech, Tanzania, 2021 – PREO

Step 5: Collect and Disaggregate Data

Use the tool to collect data from the selected audiences. Ensure the data is disaggregated. You may need to adjust the tool template and add further columns depending on the data you are collecting. For instance, if you are collecting the number and %, you will need a column for each data point.

Step 6: Analyse Data

Analyse the collected data to gather insights on GEDSI-related factors within your project. Look for patterns and trends such as comparing averages between data groups or running statistical significance tests for a more robust analysis. These can then inform your project strategy and GEDSI action plan (section 5).

Step 7: Align with TEA Operational Framework

Within this tool, indicators that respond to the highly recommended actions in the operational framework have been indicated as highly recommended. Additional indicators included are good practice for taking your GEDSI inclusivity a step further.

Step 8: Report and Communicate Findings

Regularly report your findings and progress to project beneficiaries, donors and the TEA platform, among other relevant stakeholders. Communicate any significant insights or needs that arise from your data collection efforts.

GUIDANCE

Indicator Name Column B	This column lists the specific metrics or measures used to evaluate the progress or success of the project. Indicators are quantifiable and provide a way to assess whether project objectives are being met. Example: Number of women trained.
Highly Recommended Column C	This column categories the indicators in two groups primarily, highly recommended or recommended by the TEA platform.
Data Source Columns D, E and F	These columns identify where the data for each indicator will come from. Columns D and E are for you to indicate whether the data you are collecting is from women or men. Column F can be used if this is relevant to your project. It allows you to indicate the data source for metrics pertaining to other groups (age, ethnicity, disability status, socioeconomic status, and other relevant social categories). The header for Column F can be suitably edited to indicate the social group that is being monitored. Please note that due to the difference in the way indicators are outlined in the tool, you do not need to fill columns D, E and F for all of them.
Data Collection Method Column G	This column describes the specific method or approach that will be used to collect the data. It ensures that data collection is done consistently and accurately. Example: Surveys administered to training participants.
Data Collection Frequency Column H	This column indicates how often data will be collected for each indicator. It helps in planning and scheduling data collection activities.
Responsible Party Column I	This column names the individual or organisation responsible for collecting the data. It assigns accountability and ensures that there is a designated person or team for data collection tasks. Example: Project coordinator or partnering NGO.

GUIDANCE

Baseline Data Column J	This column records the initial value of each indicator before the project begins. It serves as a reference point to measure progress over time.
Target Column K	This column specifies the desired or expected value of each indicator by the end of the project. It sets a goal for what the project aims to achieve. Example: 500 women trained (by project completion).
Actual Data Columns L, M, N, and O	This column captures the actual values achieved for each indicator during each quarter of the project. It is used to compare against the target and baseline to assess progress. Example: 120 women trained.
Status Column P	This column provides a summary of the current status of the indicator, showing whether the project is on track, ahead, or behind schedule in meeting its targets. Example: Not Started, In Progress, Completed.
Comments/Notes Column Q	This column allows for additional information, observations, or explanations related to the indicator and its progress. It can include qualitative data, contextual factors, or reasons for deviations from targets. Example: “Training sessions were delayed due to unforeseen weather conditions.”

GDI Hub

I want to know more!

Check out these additional resources:

RESOURCE	DESCRIPTION
How to use IRIS+ and 2X Challenge Indicators together	Guide on how to use gender and social impact indicators.
Navigating Impact - Gender	Bank of potential strategies to implement to achieve gender equality outcomes.
GDPR Guidelines	A brief guide on the principles of data privacy and protection, that are at the core of General Data Protection Regulation (GDPR).
A Toolkit to Start Tracking Gender Diversity at Your Workplace	Toolkit on sex-disaggregated data collection and analysis in the workplace.
Washington Group Question Sets for Disability Data	A set of questions designed to identify people with functional limitations, which can be rapidly and easily deployed in a variety of settings.

Resources

LINKS TO MORE SUPPORTING MATERIALS

Resource	Link
GENDER MAINSTREAMING AND GUIDELINES	
FCDO Strategic Vision for Gender Equality: Her Potential, Our Future	https://www.gov.uk/government/publications/dfid-strategic-vision-for-gender-equality-her-potential-our-future The 2018 to 2030 Vision for Gender Equality is DFID's Call to Action to shape and realise a future where girls and boys, women and men enjoy equal rights and equal opportunities.
ADB & Australian Aid: Tool Kit on Gender Equality Results and Indicators	https://www.oecd.org/derec/adb/tool-kit-gender-equality-results-indicators.pdf This toolkit suggests potential gender equality indicators to measure.
Gender mainstreaming practices in the context of climate responses	http://wedo.org/wp-content/uploads/2016/08/Gender-mainstreaming-practices-in-the-context-of-climate-responses.pdf This background paper reviews gender mainstreaming in the context of UNFCCC policies and programmes and what gender-responsive actions could look like.
Principles of gender mainstreaming	https://www.wien.gv.at/english/administration/gendermainstreaming/principles/five-principles.html This document sets forth five principles to apply to all gender mainstreaming activities and implementation measures.
7 Steps to Promoting Gender Equality in Recruiting and Hiring	https://www.inc.com/entrepreneurs-organization/7-steps-to-promote-gender-equality-in-recruiting-hiring.html This article shares practical steps that organisations can take to promote gender equality in their recruiting and hiring processes.
SheWorks: Putting Gender-Smart Commitments into Practice at the Workplace	https://www.ifc.org/wps/wcm/connect/de9a7ee8-940a-450a-bb19-eb452f9fa08e/SheWorks+Final+Report.pdf?MOD=AJPERES&CVID=lDhiP4z This report shares best practices on inclusive workplace policies and procedures.
Achieving Social & Business Impacts through Gender Smart Strategies	https://www.v4w.org/resources/achieving-social-business-impacts-through-gender-smart-strategies This report presents the preliminary results from a pilot of gender-smart strategies designed to both address gender disparities and improve business performance.
Opportunity of Investing in Gender-Inclusive Strategies	https://www.v4w.org/resources/driving-growth-and-improved-business-performance-the-opportunity-of-investing-in-gender-inclusive-strategies This report assesses the relationship between business performance and gender strategies for small and medium enterprises (SMEs).

LINKS TO MORE SUPPORTING MATERIALS

Resource	Link
TOOLKITS AND RESOURCE GUIDES	
Energy and Gender for Sustainable Development: A Toolkit and Resource Guide	http://www.undp.org/content/undp/en/home/librarypage/environment-energy/sustainable_energy/energy_and_genderforsustainabledevelopmentatoolkitandresourcegui.html This toolkit and resource guide provides tools to help development practitioners ask the relevant questions needed to bring about better development and energy outcomes that are gender specific and that address the needs of women in particular.
Leveraging co-benefits between gender equality and climate action for sustainable development	https://unfccc.int/files/gender_and_climate_change/application/pdf/leveraging_cobenefits.pdf This guidebook helps practitioners and stakeholders integrate gender equality considerations in climate projects and leverage co-benefits between gender equality and climate action for sustainable development.
Embedding Gender in Sustainability Reporting, A Practitioner's Guide	https://documents1.worldbank.org/curated/en/240511468333901086/pdf/513740WP0GRI1I10Box342026B01PUBLIC1.pdf This report highlights some of the existing and emerging business drivers for improving practices and reporting on gender issues.
POLICY AND STRATEGY DOCUMENTS	
Bond policy paper on FCDO's international development strategy	https://www.bond.org.uk/wp-content/uploads/2022/03/principles_and_recommendations_ids_july_2021.pdf This paper sets out a vision for international development in 2030 and a path to get there.
UK government's 2022 development strategy	https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1075328/uk-governments-strategy-international-development.pdf This document sets out the UK Government's international development strategy.
ODI's Localisation Report	https://globalfundcommunityfoundations.org/wp-content/uploads/2021/10/ODI-SH-Localisation-Report-Oct21-Proof06.pdf This report reviews the barriers and challenges to localisation and locally led practice, with a view to informing a campaign for systemic change to move forward with this agenda.

LINKS TO MORE SUPPORTING MATERIALS

Resource	Link
DEFINITION OF CONCEPTUAL RESOURCES	
UN SDG definition of LNOB	https://unsdg.un.org/2030-agenda/universal-values/leave-no-one-behind This web page defines Leave No One Behind principles as part of the SDG agenda.
USAID's definition of locally led development	https://www.usaid.gov/locally-led-partnerships This web page defines locally led development.
INCLUSIVE PRACTICES AND GUIDES	
Oxfam's Inclusive Language Guide	https://policy-practice.oxfam.org/resources/inclusive-language-guide-621487/ The Inclusive Language Guide is a resource to support people to think about how the way they write can subvert or inadvertently reinforce intersecting forms of inequality.

LINKS TO MORE SUPPORTING MATERIALS

Resource	Link
DISABILITY INCLUSION GUIDELINES	
Investing for Inclusion: Exploring a Disability Lens	https://www.ifc.org/en/insights-reports/2024/investing-for-inclusion-exploring-a-disability-lens This guide empowers investors with a step-by-step approach to integrating disability-inclusive considerations within investment strategies - throughout the investment process and life cycle.
Disability Inclusion Guidance for Companies	https://assets.bii.co.uk/wp-content/uploads/2021/03/05163420/disability-inclusion-guidance-for-companies.pdf This guidance note is designed to help companies familiarise themselves with the topic of disability inclusion and provide some key steps to become more disability inclusive.
Inclusion Counts - The Economic Case for Disability-inclusive Development	https://www.cbm.org/fileadmin/user_upload/Publications/DID_series_2_-_Inclusion_Counts__coming_soon_.pdf This report offers evidence that including persons with disabilities in key sectors such as health, education, and work and livelihoods from the outset can mean lower costs in the long run and positive returns for both the economy and society overall.
Promoting Diversity and Inclusion through Workplace Adjustments: A Practical Guide	https://www.ilo.org/publications/promoting-diversity-and-inclusion-through-workplace-adjustments-practical This guide aims to explain the concept of reasonable adjustments (“reasonable accommodation”) and provide practical step-by-step guidance on how and when these should be provided in the workplace.
The Disability-confident Employers’ Toolkit	https://inclusivefutures.org/disability-confident-employers-toolkit/ This toolkit offers practical guidance to make it easier for leaders, HR executives and property managers to foster inclusive workspaces.

LINKS TO MORE SUPPORTING MATERIALS

Resource	Link
ACCESSIBILITY AND INCLUSIVE DESIGN GUIDELINES	
ISO 21542:2021 Building construction — Accessibility and usability of the built environment	https://www.iso.org/standard/71860.html This document specifies a range of requirements and recommendations for the elements of construction, building assemblies, components, fittings and products that relate to the design and constructional aspects of usability and accessibility of buildings.
Disability-inclusive Communications Guidelines	https://www.un.org/sites/un2.un.org/files/un_disability-inclusive_communication_guidelines.pdf These guidelines can assist communications focal points and other staff to make all communications disability inclusive and accessible.
Make your Content Accessible to Everyone - Microsoft Guidelines	https://support.microsoft.com/en-gb/office/make-your-content-accessible-to-everyone-ecab0fcf-d143-4fe8-a2ff-6cd596bddc6d Guidelines showing how to make sure that everyone can read, work with, and enjoy the documents, presentations, emails, and spreadsheets you and your team create and share.
Accessibility Guide for Suppliers - Digital Accessibility	https://home.barclays/content/dam/home-barclays/documents/who-we-are/our-suppliers/Supplier-Accessibility-Guide.pdf Guidelines for IT suppliers to develop and deliver accessible products and services.
Inclusive Design Strategy	https://www.disabilityinnovation.com/news/inclusive-design-strategy Overview of an approach to applying inclusive design principles.

For more information on this toolkit or troubleshooting around the tools, please contact:
TEAadmin@carbontrust.com

VALUE FOR WOMEN

UKaid from the British people

Transforming Energy Access

Global Disability Innovation Hub

CARBON TRUST