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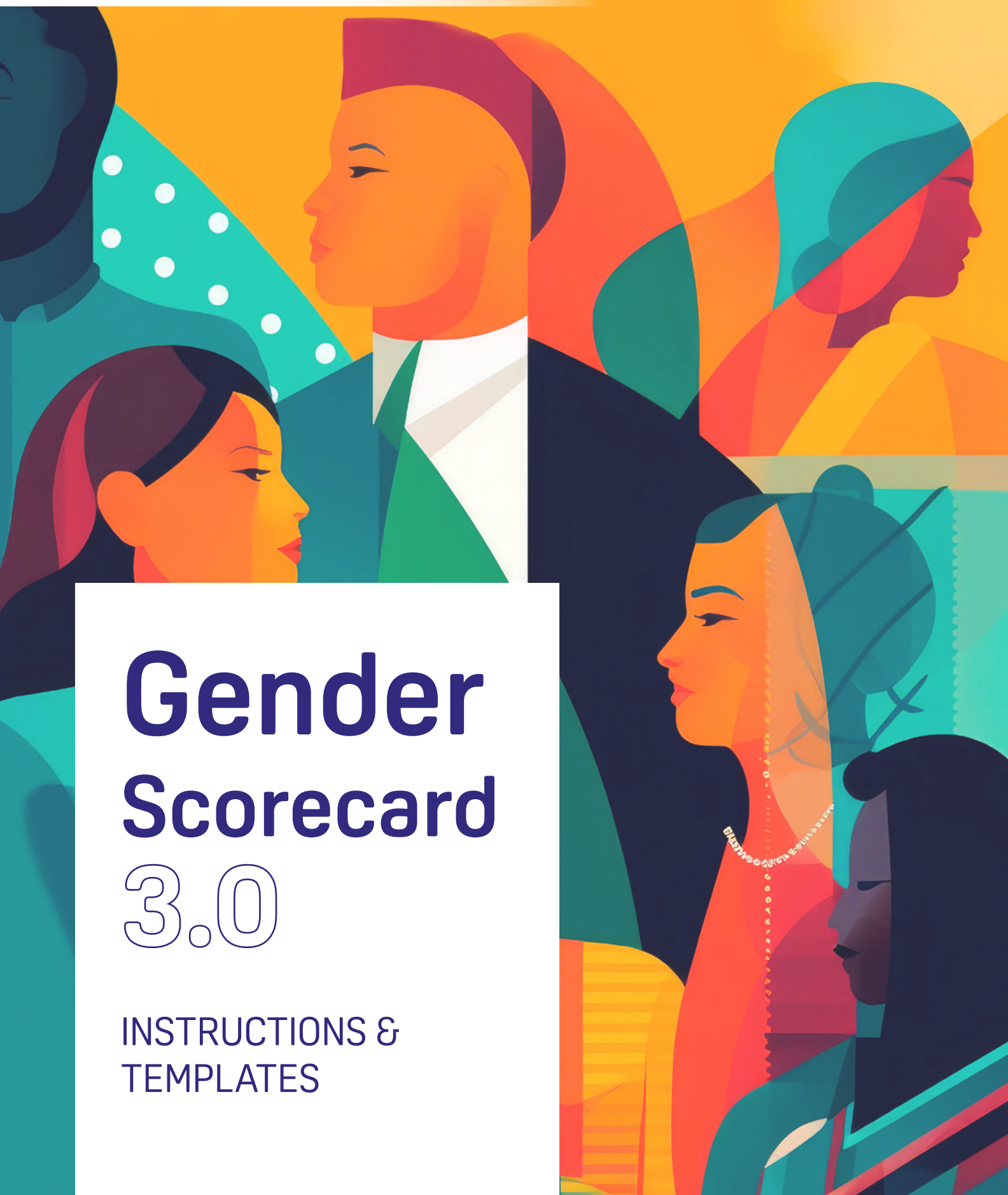


Gender Scorecard 3.0

INSTRUCTIONS & TEMPLATES

The Commonwealth of Learning (COL) is an intergovernmental organisation created by Commonwealth Heads of Government to promote the development and sharing of open learning and distance education knowledge, resources and technologies.

Published by

COMMONWEALTH OF LEARNING
4710 Kingsway
Suite 2500, Burnaby
British Columbia
Canada V5H 4M2
Telephone: +1 604 775 8200
Fax: +1 604 775 8210
Web: www.col.org
E-mail: info@col.org

Acknowledgements

This edition of the Gender Scorecard 3.0 for Gender Mainstreaming has been revised by Mig Alphonso, Gender Adviser and Bavoshia Silas-Bossan, Programme Assistant of the Commonwealth of Learning. The previous version of the Gender Scorecard 2.0 was written by Kisanet Tezare and edited by Rosanne Wong.

CONTENTS

What is a Gender Scorecard for Gender Mainstreaming?

The Commonwealth of Learning (COL) has designed this Gender Scorecard to support partner institutional/organisational gender mainstreaming. This will be achieved, first, by conducting a comprehensive and systematic self-assessment of the organisation's/institution's policies and practices through surveys and questionnaires. Then, the results of the Gender Scorecard assessment/audit will help the organisation/institution define clear next steps for the effective promotion of gender equality.

The Gender Scorecard can be used by an organisation/institution as a self-assessment tool. It is recommended that all staff members at the organisation/institution should participate in the exercise because gender mainstreaming is a process for integrating a gender perspective in planned actions. Gender mainstreaming, therefore, seeks to challenge and transform gender norms and stereotypes. It is also about changing attitudes to promote equal opportunities and outcomes for all genders.

What is a Gender Scorecard for Gender Mainstreaming?

A Gender Mainstreaming Scorecard analyses an organisation's/institution's policies and practices specifically in relation to the status of gender equality within all levels of the organisation/institution.

What is the purpose of the Gender Scorecard?

Once completed, the Gender Scorecard will:

- **provide key insight** into an organisation's/institution's policies and practices in relation to gender mainstreaming,
- **help define clear next steps** for the effective promotion of gender equality.

Gender mainstreaming remains one of the most used and practical approaches to addressing gender inequality. It is a strategy to narrow the inequality gap by integrating ***strategies/policies*** in any area and at all levels. and implementing ***targeted interventions*** (specific activities for addressing gender equality issues) in any area and at all levels. It is a process of integrating a gender perspective in planned actions that incorporates the concerns and experiences of girls/women and boys/men into the design, implementation, monitoring and evaluation of all policies and programmes so that everyone benefits equally.

The development results/outcomes for gender mainstreaming are gender equality and women's empowerment through changes in norms, cultural values, power structures, and the roots of inequalities and discrimination.

The two options for facilitating COL's Gender Scorecard self-assessment process are: any staff member/s at the organisation/institution with direct and active experience in gender mainstreaming; and/or an external gender consultant.

To complete the Gender Scorecard process, participating organisations/institutions first assign a staff member (an individual or a team) and/or an external consultant who would be responsible for facilitating the entire process. This designated staff member, Gender Team and/or consultant will help gather and analyse supporting documents (Appendix II: Means of Verification) and conduct an Internal Employee Survey (Appendix III) to provide qualitative data for the Means of Verification and the scorecard.

Using the Internal Employee Survey's results, staff members will score their organisation/institution on various indicators of gender mainstreaming contained in the Scorecard.

Once completed, the Gender Scorecard assessment will help create a reliable baseline against which the organisation/institution can measure progress in gender mainstreaming. Organisations/institutions that conduct a gender audit/assessment on an annual basis using COL's Gender Scorecard (or other gender audits) will see major benefits like improvements in policy and programming/projects to reduce gender inequalities.

How to complete the Gender Scorecard:

Gather and analyse the Means of Verification (see Document Checklist)

Conduct an employee survey (see Internal Survey for Employees)

Complete the Scorecard (see The Gender Scorecard)

Develop the Gender Roadmap for follow-up actions (see Gender Roadmap/Action Plan)

How to complete the Gender Scorecard: The Steps

1. Plan & prepare

a. **Designate an individual**, create a Gender Team and/or engage an external consultant to lead the process if in-house capacity to lead the exercise does not exist.

b. **The individual/Gender Team and/or Consultant should familiarise themselves** with the gender concepts and terms in the Glossary (see Appendix I), the Scorecard process, surveys, performance areas, indicators, Roadmap/Action Plan, the necessary documents (Means of Verification - Appendix II).

c. **The individual/Gender Team and/or Consultant should conduct a workshop/meeting** to raise awareness/discuss the gender concepts and terms in the Glossary and the Gender Scorecard in detail with managers and staff at all levels before beginning the Gender Scorecard's self-assessment process. This is necessary to ensure that staff members are aware of the necessary gender concepts and terminology, the importance of the Scorecard and to understand the overall process.

d. **A schedule** (timeline) for the scoring and Roadmap workshops should be established, allowing up to three to four weeks for document collection and the Internal Survey for Employees to be completed beforehand.

2. Internal Staff Survey

a. **The Internal Survey for Employees (Appendix III) should be distributed to all staff and management.** Paper copies can also be distributed if needed.

b. **Staff members should be given at least three weeks to complete the survey.** If fewer than 50% of staff members have returned the completed survey by the end of the second week, a reminder should be sent out by the Gender Team. The timelines can be adapted and adjusted if necessary to ensure that all employees have had a chance to complete the survey.

c. **If the survey response rate is lower than 50%,** the Gender Team members should try to arrange one-to-one interviews with key managers and staff to analyse the survey individually or in a workshop facilitated by the Gender Team/individual.

d. **The results from the Internal Staff Survey are necessary for guiding the scoring process** in the Scorecard's Section One: Internal Management/Policy Assessment; Performance Area 1.2; *Indicator 6: Employee Survey results.*

3. Evaluate & analyse

a. **The scoring workshop be scheduled and convened.** Attendees should work through the Gender Scorecard as a group, collectively analysing and discussing the indicators, as well as the Means of Verification (see Appendix II).

b. **Use the Internal Staff Survey submissions to assess and score the organisation/institution** on the level of staff familiarity with gender mainstreaming (Section One, Performance Area 1.2, indicator 6 in the Scorecard).

c. **When filling out the Scorecard,** use the answer that most accurately reflects the organisation's/institution's status or practice. If there is uncertainty about a rating, opt for the lower option.

d. **Enter the answers** in the digital or paper version of the scorecard table.

e. **Assessment and scores** from the survey, key observations, discussions and comments about each indicator should be noted down, as the Gender Team/individual/consultant moves through the Scorecard. These notes will help inform the development of the Roadmap/Action Plan.

f. **The completed Scorecard should be submitted to the organisation/institution,** and results viewed/analysed by the Gender Team and/or individual/consultant.

4. Develop the Gender Mainstreaming Roadmap/ Action Plan

a. **Schedule a focus group** (participatory sessions) to review the gender concepts and terminology, results from the staff survey and Scorecard assessment to develop the Gender Roadmap (see Appendix IV).

b. **Develop a Roadmap for follow-up actions** using the template (see Appendix V). These actions/activities will be based on the indicators that were scored as Level 1 and/or Level 2.

How long will it take to complete the Gender Audit?

APPROXIMATELY, THE TOTAL TIME FOR THE PROCESS IS 13 WEEKS, FROM START TO FINISH. The gathering of documentation (Means of Verification) and the Internal Survey for Employees can occur concurrently, reducing the total time by another 2 weeks, if deemed possible.

THREE WEEKS to search for and designate a facilitator (internal staff member, Gender Team or find and hire an external consultant)

THREE WEEKS to gather and analyse the Means of Verification (organisational/ institutional documents).

THREE WEEKS to complete the Internal Survey for Employees, including survey distribution.

TWO WEEKS after completion of Internal Survey for Employees, schedule workshop for the Scorecard.

ONE WEEK after the Scorecard workshop, schedule workshop for development of the Roadmap/Action plan

ONE WEEK to finalise the Roadmap, distribute to staff and write a final report.

The Gender Scorecard

COL's Gender Scorecard for Gender Mainstreaming 3.0 is divided into two sections:

1. **An assessment of the internal** culture and policies of an organisation/institution which focuses on employment equality, office HR policies/processes and internal capacities.
2. **An assessment of the external** programming, projects, or curricula. These are sometimes referred to as an organisation's/institution's 'outputs,' which are the direct products or services stemming from the activities of an organisation, policy or programme/project.

What does the Gender Scorecard evaluate?

Internal culture and policies in relation to gender including employment equality

External projects, programming or curricula (outputs)

Both sections of the Scorecard are further divided into "**Performance Areas**" in Section One (Table 1) and Section Two (Table 2). These Performance Areas represent areas in which efforts towards gender mainstreaming either are or should be, taking place in an organisation/institution. The Performance Areas comprise several indicators which include specific policies or practices.

A list of the specific documents (Means of Verification) needed for the assessment are provided under the introduction for each Performance Area in the Scorecard (see tables in Section One and Section Two of the Scorecard). These should be assessed to respond to the questions in each section. It will be useful to have these documents on hand when working on these sections during the workshop.

The participating organisation/institution determine their score for each indicator based on their analysis of relevant documents vis-a-vis the indicators in the response options; organisations/institutions simply need to determine which response option most closely represents their status.

What are Performance Areas?

The term Performance Areas refers to indicators like policies or practices adopted by an organisation/institution to address gender-related issues.

- Each indicator response option is assigned a value of 1, 2, or 3, with 1 being the lowest score and 3 being the highest. Remember, if there is uncertainty about the rating, go for the lower option.
- Upon completion of the Gender Scorecard, a total gender mainstreaming level is calculated for the institution on a Gender Equality Scale Levels 1 to 3.

Understanding the Results

Upon completion of the Gender Scorecard, two types of results should be considered: the overall score and the score for each individual indicator.
While the overall institutional score is a general indicator of gender mainstreaming, it is important to view each indicator as independent, and as necessary for fully integrating gender into internal and external practices.

The rankings for each performance area, the score (category, section, and total), the total percentage, and the level. The total score is aligned to each level as described below:

Section One:
Internal staff management/policy assessment Level 1 to 3

LEVEL 1 INADEQUATE: A level 1 score means that the organisation/institution still has significant work to do to promote and achieve gender mainstreaming. Organisations/institutions with a level of 1 may have also faced grave challenges (e.g., lack of resources, technical skills, uncertain political will, unstable organisational/institutional culture or lack of a uniform vision on gender equality).

Organisations/institutions should derive recommendations for improvement from the Level 2 and Level 3 indicators to develop a Roadmap/Action Plan for follow-up actions. A measured and step-by-step approach to strengthening gender mainstreaming should be adopted.

LEVEL 2 NEEDS IMPROVEMENT: A level 2 score means that serious progress has been made towards improving gender mainstreaming through implementation of specific policies and programmes, but more follow-up on key unmet conditions is required. Organisations/institutions can develop a Roadmap/Action Plan for follow-up actions with the help of Level 3 indicators.

LEVEL 3 SUFFICIENT: A level 3 score means that an organisation/institution has made significant investments in gender mainstreaming. The organisation/institution should work to maintain this level of gender equality.

To develop the follow-up actions, look at the "ideal scenario" response, which will be highlighted for each indicator in the results summary. The facilitators may need to adapt the actions to the specific context and needs of the organisation/institution. Additional contextual or other action items that emerged from the Scorecard assessment may be also added to the roadmap.

Section Two: Gender Equality Scale: Definitions and examples

The Gender Equality Scale necessary for responding to the Scorecard questions under *Performance Area 2.3: Gender Analysis, Implementation and Evaluation in External Programmes/ Services*. It is a beneficial tool for developing the Gender Equality Roadmap. All projects/ programmes/curricula can be analysed and scored using the scale below.

Projects/programmes/curricula must achieve a score of 2 or 3 for them to be recognised as gender mainstreamed. Projects scored as 1 do not reflect gender mainstreaming adequately and should be revised to better address the differential needs of girls/women and boys/men.

Gender Equality Scale

Levels	Definition	Example
1	Outputs at the project level/curriculum development are not contributing to gender equality. Project/policy does not take different gendered needs into account, but rather accounts for the needs of "everyone" (i.e., gender omission).	*Sustainable development programmes provide families with bicycles that allow all children to attend schools.*
2	Gender equality is not the primary objective of the project's output/curriculum, but the output is gender sensitive and promotes gender equality in a significant way. Evidence is provided if a gender analysis has been done and change related to gender equality will occur.	*Public perception surveys are conducted, findings of which will influence future programming that will account for gender discrepancies.* *Different teaching methods developed and used in the classroom to engage both girls and boys.*
3	Gender equality is the explicit and primary objective of the project/policy/curriculum development.	*Tutoring services and mentorship programme designed to increase boys' completion of secondary school.* *Women's hygiene products provided to girls to encourage their attendance/participation in all activities.*

Before the workshops to complete Section One and Section Two of the Gender Scorecard ensure that the Means of Verification (e.g., documents, observations, interviews and survey) and the Internal Survey for Employees (see Appendix III) have been completed, collected and analysed.

Remember to use the Gender Equality Scale above in answering the questions in Performance Area 2.3

1 Section One: Internal staff management/policy assessment

In this section, the internal culture and policies of an organisation/institution will be assessed. It will focus on employment equality, office HR policies, and internal capacities.

Gender Scorecard: Section One

Reset Form

Indicators	Means of verification/ Evidence (necessary documentation)	Evaluation (select the option that most closely applies to your organisation)	Score
PERFORMANCE AREA: 1.1) Management Systems demonstrate a commitment to gender equal internal policies/practices			
1. Terms of References (ToR) explicitly refer to gender equality concerns and responsibilities	*Terms of Reference (ToRs)*	1 – ToRs do not refer to gender equality concerns/ responsibilities 2 – Some ToRs refer to gender equality concerns/ responsibilities 3 – All ToRs explicitly refer to gender equality concerns/responsibilities	
2. Mission Statement highlights commitment to gender equality	*Mission Statement*	1 – Mission statement does not include gender equality 2 – Mission statement mentions gender equality 3 – Mission statement explicitly commits to gender equality in internal/external practices	
3. Gender Team meeting minutes and impact summaries demonstrate actions taken by Gender Team to promote gender equality within the workplace through various means	*Gender Team meeting minutes and impact summaries*	1 – No Gender Team formed 2 – Gender Team is formed with junior and senior staff, but has not demonstrated effective impact on promoting gender equality 3 – Gender Team is formed and has effectively promoted gender equality within the workplace through various avenues like trainings, workshops, policies, roundtables, and other activities	
4. Action Plan developed for internal gender equality which is being implemented according to the designated timeline	*Gender equality Action Plan/policy proposals for internal work culture*	1 – No Action Plan for gender equality developed 2 – Action Plan has been developed, but has not been implemented 3 – Action Plan is developed, and is being actively implemented	
1.1 TOTAL CATEGORY SCORE *Add up the score from each row/answer (questions 1 to 4).*			
1.1 CATEGORY LEVEL *Find the score in the scale and corresponding Level.* *Score:* 4-7 8-11 12 *Level:* 1 2 3			LEVEL

Indicators	Means of verification/ Evidence (necessary documentation)	Evaluation (select the option that most closely applies to your organisation)	Score
PERFORMANCE AREA: 1.2) Capacities to develop gender equal internal policies/practices			
5. Registration for internal trainings/ speaker series which highlight why gender equality is important and how to implement policies	*Registration records, attendance lists or other evidence of internal trainings/ speaker series*	1 – No staff training planned or implemented 2 – Less than 80% of staff attend trainings/speaker series 3 – More than 80% of staff attend trainings/speaker series	
6. Employee Survey results indicate the familiarity of staff with internal gender mainstreaming practices	*Internal Survey for employees' results*	1 – Survey results indicate the majority of staff are unfamiliar with gender mainstreaming practices 2 – Survey results indicate over 50% of staff are familiar with gender mainstreaming practices 3 – 100% of staff are familiar with gender mainstreaming practices	
7. The organisation/ institution has an internal gender specialist, or a budget is allocated for gender policy development and training by specialists	*Budgets: account for internal policy development and training*	1 – No internal specialist and no budget assigned to internal policy development and gender training 2 – No internal specialist and less than 5% of the organisation's/institution's budget earmarked for internal gender-related learning activities 3 – At least 5% of organisation's/institution's budget earmarked for internal gender-related learning activities and/or presence of an internal gender specialist within the organisation/institution who can support internal policy development and training in gender	
8. ToRs of Gender Team staff allocate time for gender mainstreaming activities	*ToRs of Gender Team staff*	1 – No time specifically designated for gender mainstreaming OR no Gender Team 2 – Less than 10% of Gender Team staff's time is dedicated to gender mainstreaming 3 – More than 10% of Gender Team staff time is dedicated to gender mainstreaming	
1.2 TOTAL CATEGORY SCORE *Add up the score from each row/answer (questions 5 to 8).*			0
1.2 CATEGORY LEVEL *Find the score in the scale and corresponding Level.* *Score: 4-7 8-11 12* *Level: 1 2 3*			**LEVEL**

Indicators	Means of verification/ Evidence (necessary documentation)	Evaluation (select the option that most closely applies to your organisation)	Score
PERFORMANCE AREA: 1.3) Enabling environment to develop gender equal internal policies/practices			
9. Harassment policy developed, updated, and implemented	*Copy of Harassment policy*	1 – No harassment policy OR the harassment policy has not been reviewed/updated in the last year 2 – Up-to-date harassment policy, but it has not been distributed to staff 3 – Harassment policy updated annually and distributed to staff	
10. Gender disaggregated data on harassment complaints (received and resolved) indicate harassment complaints are received and resolved	*Gender disaggregated data on harassment complaints (received and resolved)*	1 – Fewer than 40% of complaints are resolved and/or no avenue is available to members of the organisation/institution to file complaints 2 – More than 40% of complaints have been resolved. A clear and well-advertised avenue to file and receive complaints has been developed 3 – More than 70% of complaints have been resolved. A clear and well-advertised avenue to file and receive complaints has been developed	
11. Women and men are equally represented in decision-making positions	*Number of staff by level of responsibility, position, and department (gender disaggregated)* *Gender disaggregated data of board of directors* *Gender disaggregated data: contract type*	1 – Fewer than 20% of decision-making positions in all departments are held by women (fewer than 20% of senior staff/mid-level managers/board of directors are women) 2 – 20-39% of decision-making positions are held by women 3 – More than 40% of decision-making positions are held by women	
12. Women and men are paid equally for comparable roles	*Gender disaggregated data: wages*	1 – Women and men with the same level of responsibility/experience are not paid equally 2 – Women and men with the same level of responsibility/experience are sometimes paid equally 3 – All women and men with the same level of responsibility/experience are paid equally	

category continues on next page...

category continued...

Indicators	Means of verification/ Evidence (necessary documentation)	Evaluation (select the option that most closely applies to your organisation)	Score
13. Gender conscious internal HR policies are in place	*Copies of Extended Leave policies: paternity/ maternity leave* *Gender disaggregated data on the number of employees who use paternity/maternity leave* *Gender disaggregated data on the number of employees who use flexible working hours*	1 – No work/life balance policies in place for extended leave/flex time/other benefits 2 – Gender conscious internal policies in place but fewer than 40% of eligible staff utilise the benefits 3 – Gender conscious internal policies in place and more than 40% of eligible staff utilise the benefits	
14. Gender equality hiring policy in place	*Copy of Gender equality hiring policy*	1 – No gender equality hiring policy in place 2 – Gender equality hiring policy developed but not implemented/outdated 3 – Gender equality hiring policy developed, implemented, and reassessed annually	
15. Women applying for and filling open positions	*Gender disaggregated data: number of job applications, and number of new hires in the current year*	1 – Fewer than 20% of applicants are women and fewer than 20% of positions are filled by qualified women applicants 2 – 20 - 39% of applicants are women & 20 - 39% of positions are filled by qualified women applicants 3 – More than 40% of applicants are women & more than 40% of positions are filled by qualified women applicants	
16. Internal promotion policy in place which aligns with gender equality frameworks	*Copy of promotion policy*	1 – No promotion policy in place OR promotion policy does not reference gender equality 2 – Gender equality promotion policy developed but not implemented/outdated 3 – Gender equality promotion policy developed, implemented, and reassessed annually	
17. Women earning promotion nominations and earning promotions	*Gender disaggregated data: number of people nominated/considered for promotion, number of people promoted, etc.*	1 – Fewer than 20% of those nominated for promotion are women and fewer than 20% of promotions are earned by qualified women 2 – 20 - 39% of those nominated for promotion are women and 20 - 39% of promotions are earned by qualified women 3 – More than 40% of those nominated for promotion are women and more than 40% of promotions are earned by qualified women	
1.3 TOTAL CATEGORY SCORE *Add up the score from each row/answer (questions 9 to 17).*			0
1.3 CATEGORY LEVEL *Find the score in the scale and corresponding Level.* *Score: 9-17 18-26 27* *Level: 1 2 3*			**LEVEL**

Indicators	Means of verification/ Evidence (necessary documentation)	Evaluation (select the option that most closely applies to your organisation)	Score
PERFORMANCE AREA: 1.4) Internal Gender Analysis or Gender Audit			
18. Annual Internal Gender Scorecard / audit conducted	*Annual Internal Gender Scorecard/ audit report (either COL's Scorecard, or other gender assessment)*	1 – No annual gender audit 2 – Inconsistent gender audit (less than once a year) 3 – Consistent annual gender audits	
19. Action Plan / Gender Road- map and policy proposals developed and implemented to address issues related to gender mainstreaming	*Internal Gender Road-map or Action Plan* *Gender policies/ proposals*	1 – No Action Plan / policy proposals developed 2 – Action Plan / policy proposals developed but not actively implemented / followed according to designated timelines 3 – Action Plan / policy proposals developed and actively implemented / followed according to designated timelines	
20. Staff are surveyed annually regarding gender responsiveness of organisational / institutional policies and practices	*Annual Staff Survey results (either COL's Internal Survey for Employees, or other survey conducted)*	1 – No evaluation of gender policies / gender equality projects / gender mainstreaming activities 2 – Infrequent evaluation of gender policies / gender equality projects / gender mainstreaming activities (less than once a year) 3 – Annual evaluation of gender policies / gender equality projects / gender mainstreaming activities	
1.4 TOTAL CATEGORY SCORE *Add up the score from each row/answer (questions 18 to 20).*			0
1.4 CATEGORY LEVEL *Find the score in the scale and corresponding Level.* *Score: 3-5 6-8 9* *Level: 1 2 3*			**LEVEL**

SECTION 1: TOTAL INTERNAL GENDER SCORE

1. Add up the score from each category (category 1.1 to 1.4).
2. Find the score in the scale and corresponding Level.
Score: 20-39 40-59 60
Level: 1 2 3

SCORE 0 **LEVEL**

2 Section Two: External Assessment

This section will assess the organisation's/institution's "outward-facing" or external, programming, projects, services or curricula, sometimes referred to as organisational/institutional outputs.

Gender Scorecard: Section Two

Reset Form

Indicators	Means of verification/ Evidence (necessary documentation)	Evaluation (type in the number that most closely applies to your organisation)	Score
PERFORMANCE AREA: 2.1) Management Systems: Demonstrated commitment to gender mainstreaming programmes			
21. Implementation of an up-to-date Action Plan (or Roadmap) for gender mainstreaming of external programmes, guided by global strategies and frameworks	*Gender Action Plan (or Roadmap) (reference to external programmes/services)*	1 – No gender equality Action Plan developed for external programmes/services 2 – Gender equality Action Plan for external programmes/services developed but not implemented, or outdated (not updated within the last year) 3 – Gender equality Action Plan for external programmes/services developed, updated annually, and implemented	
22. Mission statement highlights commitment to gender mainstreaming in external programmes	*Mission Statement*	1 – Mission statement does not include gender equality 2 – Mission statement mentions gender equality and uses gender-inclusive language 3 – Mission statement explicitly emphasises commitment to gender equality using gender-inclusive language	
2.1 TOTAL CATEGORY SCORE *Add up the score from each row/answer (questions 21 to 22).*			0
2.1 CATEGORY LEVEL *Find the score in the scale and corresponding Level.* *Score:* 2-3 4-5 6 *Level:* 1 2 3			LEVEL

Indicators	Means of verification/ Evidence (necessary documentation)	Evaluation (type in the number that most closely applies to your organisation)	Score
PERFORMANCE AREA: 2.2) Capacities to develop gender-responsive external programmes/practices			
23. Budget is allocated for external programmes, gender mainstreaming, professional development, and training	*Budgets: Staff training and professional development budgets (account for external programmes, gender mainstreaming development, and training)*	1 – Staff do not have an allocated budget for professional development and training in gender mainstreaming for external programmes/services 2 – Fewer than 5% of the organisation's/institution's budget is earmarked for professional development and training in gender mainstreaming for external programmes/services 3 – At least 5% of the organisation's/institution's budget is earmarked for professional development and training in gender mainstreaming for external programmes/services	
24. Staff have undergone training for gender mainstreaming for programmes/projects/services/curricula	*Registration/ attendance lists or other evidence of staff training and development in gender mainstreaming for external programmes*	1 – No staff trainings implemented 2 – Fewer than 80% of staff attended educational training in the past year 3 – More than 80% of staff attended gender mainstreaming in the past year	
25. Staff are familiar with principles of gender mainstreaming in programmes/projects/services/curricula	*Internal Survey for Employees (or other staff survey) results: measure the familiarity of staff with gender mainstreaming practices and the role of gender equality*	1 – Survey results indicate that most staff are unfamiliar with gender mainstreaming practices 2 – Survey results indicate over 50% of staff are familiar with gender mainstreaming practices 3 – 100% of staff are familiar with gender mainstreaming practices	
26. The organisation's/institution's programme budgets contribute to gender programmes/services/curricula	*Organisation's/ institution's programme budget*	1 – 0% of the organisation's/institution's programme budget contributes to gender equality programmes/projects/services/curriculum development 2 – Less than 15% of the organisation's/institution's programme budget contributes to gender equality programmes/projects/services/curricula 3 – At least 15% of the organisation's/institution's programme/curriculum budget contributes to gender equality programmes/projects/services/curricula	
2.2 TOTAL CATEGORY SCORE *Add up the score from each row/answer (questions 22 to 26).*			0
2.2 CATEGORY LEVEL *Find the score in the scale and corresponding Level.* *Score: 4-7 8-11 12* *Level: 1 2 3*			**LEVEL**

Indicators	Means of verification/ Evidence (necessary documentation)	Evaluation (type in the number that most closely applies to your organisation)	Score
PERFORMANCE AREA: 2.3) Gender analysis, implementation and evaluation in external programmes/services			
27. Studies/fact-finding missions/research has been conducted to identify gender needs of stakeholders within specific contexts	*Gender needs analysis research reports/studies/ fact-finding mission reports: identify gender needs within specific community contexts*	1 – No studies conducted on gender needs 2 – Studies on gender needs within the specific organisational/institutional context are infrequent and/or outdated (over 3 years old) 3 – Studies on gender needs within specific organisational/institutional contexts are conducted regularly and are up-to-date (conducted within the past 3 years)	
28. Project proposals/ approved project summaries are scored according to gender responsiveness	*Approved project proposals/approved project summaries: each project will be ranked on a Gender Equality Scale (1-3).*	1 – Project proposals/approved projects are not assessed for gender equality OR the majority (>50%) of project proposals/approved projects are ranked as a 1 on the gender equality index (or equivalent) 2 – More than 50% of project proposals/approved projects are ranked as a 2 or 3 on the gender equality index (or equivalent) 3 – No project proposal/approved project is ranked as a 1 on the gender equality index/equivalent index (all projects are ranked as a 2 or 3 or equivalent)	
29. Gender-specific evaluation, with gender disaggregated quantitative and qualitative evidence of programmes/ projects/services/ curricula	*Donor reports* *Qualitative surveys/ interviews with beneficiaries (if relevant)* *Gender disaggregated data: outcomes/surveys and/or interviews with a number of beneficiaries* *Gender disaggregated data on the number of project participants/ learners.*	1 – No evaluation of projects/policies/curricula, or no gender-specific evaluation of programmes/projects/ policies/curricula 2 – Some gender-specific evaluation of projects/policies/ curricula (e.g., gender-disaggregated data collected, but no survey conducted or vice versa) or complete gender-specific evaluation for some (but not all) projects/policies/curricula 3 – Complete gender specific evaluation, with gender disaggregated quantitative and qualitative evidence, of all projects/policies/curricula	
2.3 TOTAL CATEGORY SCORE *Add up the score from each row/answer (questions 27 to 29).*			0
2.3 CATEGORY LEVEL *Find the score in the scale and corresponding Level.* *Score: 3-5 6-8 9* *Level: 1 2 3*			LEVEL

SECTION 2: TOTAL EXTERNAL GENDER SCORE

1. Add up the score from each category (category 2.1 to 2.3).
2. Find the score in the scale and corresponding Level.
Score: 9-17 18-26 27
Level: 1 2 3

SCORE: 0

LEVEL:

INSTITUTIONAL GENDER SCORECARD
TOTAL SCORE

1. Add up the score from each section (sections 1 and 2).
2. Find the score in the scale and corresponding Level.

Score:	*29-57*	*58-86*	*87*
Level:	*1*	*2*	*3*

TOTAL SCORE	LEVEL
0	

The Roadmap or Action Plan

Once the results of the Internal Staff Survey and the Scorecard have been gathered and analysed, the Gender Roadmap (Action Plan) can be developed. Like the Scorecard assessment workshop, the roadmap development should be a collaborative process, which may be facilitated by an institutional gender expert or an outside consultant. This facilitator should be the same as the one handling the Gender Scorecard process.

A **Gender Roadmap** or Action Plan is an institutional document that outlines the long-term plans for gender mainstreaming in an institution or organisation. The roadmap should be based on the Scorecard results and should use the Level 3 indicators as guidelines. The roadmap provides the organisation/institution with a plan to address any gaps or weaknesses that were identified during the Scorecard assessment.

The Gender Roadmap provides a clear follow-up action plan that addresses gaps and weaknesses identified through the Gender Scorecard assessment/ survey.

What is the Gender Roadmap Worksheet?

The Gender Roadmap Worksheet is a template to help organisations/institutions customise a plan for gender mainstreaming activities and is based on the results of the COL Gender Scorecard for Gender Mainstreaming 3.0. The worksheet enables organisations/institutions to:

- summarise the areas that need improvement,
- plan the next steps,
- establish a timeline for completion,
- identify persons responsible for the activities,
- establish the means of verification for specific activities, and
- devise a budget for each item.

Facilitators may choose to use this worksheet as the basis for a more comprehensive Action Plan or roadmap for organisational/institutional gender mainstreaming, or to inform individual plans/proposals for each of the identified "next steps."

See Appendix V for the Gender Roadmap Worksheet Template.

Appendix I: Glossary/Key Terms

Action Plan and Gender Roadmap: *Action Plan:* A planning and management tool used to present the key measurable components of an overall objective, project, or programme in a table or framework format. *A Gender Roadmap* is this document refers to the institutions/organisation's document that outlines the long-term plans for gender mainstreaming in an institution or organisation.

Employee/staff survey: An internal survey completed by employees/staff assessing the policies, programmes/projects, and curricula in terms of how organisations/institutions is doing toward integrating (gender mainstreaming) gender equality considerations and whether they are successfully meeting gender-related indicators.

Gender: The social, cultural, and psychological characteristics, roles, and expectations that a society considers appropriate for individuals based on their perceived or self-identified sex. It's not just a binary male or female as assigned at birth (cisgender) with socially constructed stereotypes and prescribed roles.

Gender analysis: A variety of methods used to identify and understand the relationship between women and men, their access to resources, their activities, and the constraints they face relative to each other. It provides the information necessary to recognise the connection between race, ethnicity, culture, age, disability and/or status and the patterns of involvement and control, behaviour and activities available to women and men in economic, social and legal structures.

Gender audit/assessment: Analysing and evaluating policies, programmes and curricula on an annual basis in terms of how organisations/institutions have made changes based on gender considerations and whether they are successfully meeting gender-related indicators. This assessment can be completed either using COL's Gender Scorecard 3.0, or any other assessment tool for conducting a gender audit.

Gender awareness: Understanding that socially and culturally determined differences between girls/women and boys/men based on learned behaviour affect their ability to access and control resources.

Gender equality: Equal rights, responsibilities, and opportunities for everyone, regardless of their biological sex. It does not mean that girls/women and boys/men will become the same but that their interests, needs, and priorities are considered equally important while recognising the diversity of different groups. Gender equality is a human rights issue as well as a precondition and indicator of sustainable, people-centred development.

Gender mainstreaming: The process of assessing the implications for girls/women and boys/men of any planned action, including legislation, policies or programmes, in any area and at all levels. It is a strategy for integrating the concerns and experiences of both genders into the design, implementation, monitoring and evaluation of all policies and programmes so that everyone benefits equally. Its goal is gender equality.

Gender sensitive: Being aware and sensitive to the different needs, experiences and ways in which gender can impact individuals and communities, and taking steps to ensure that policies, practices and attitudes are inclusive and respectful of all genders. Gender sensitivity is essential for promoting gender equality and addressing gaps/issues related to gender inequality (discrimination and bias).

Gender-disaggregated data: While sex-disaggregated data is information on individuals broken down by biological sex, gender statistics rely on gender-disaggregated data that reflect the realities of the lives of women and men. It allows for the measurement of differences between biological sex on various sociological and economic dimensions and includes concepts, definitions and methods that reflect data broken down into gender roles, relations and inequalities in society (e.g., distribution in the workforce/sectors, leadership roles, etc.).

Results-Based Management (RBM) (also referred to as Managing for Results):
A management strategy based on accountability and transparency that uses participatory input and makes the combined knowledge available to all to ensure plans, projects or programmes deliver results and improve performance.

- *Gender Indicators*: metrics related to gender, such as the proportion of women in leadership roles, how much men and women in similar roles are paid, number of harassment claims reported by women, etc.
- *Means of Verification*: tools used as part of an RBM process to collect the data necessary to measure progress. The data collected may be quantitative or qualitative.

- *Outputs*: the direct products or services stemming from the activities of an organisation, policy or programme/project.
- *Performance Areas*: the key aspects that are evaluated to assess the effectiveness of gender mainstreaming efforts. Each performance area would have indicators to identify how successful the are (see Gender Indicators).
- *Quantitative data:* data used to answer questions such as, how many, how often, what proportion, and how much, and is largely collected through surveys and institution records. Qualitative data is more open-ended and often collected through interviews, focus groups and other qualitative data collection methods.
- *Result:* a describable or measurable change that is derived from an initiative/programme/project outputs/outcomes/impact.

Appendix II: Means of Verification (documents) Checklist

Section One: Internal Assessment

Reset Checklist

Examples

- [ ] Terms of Reference (ToRs) for staff
- [ ] Mission Statement
- [ ] Gender Team meeting minutes and impact summary
- [ ] Gender equality Action Plan or Roadmap/policy proposals for internal work culture
- [ ] Registration for internal gender trainings
- [ ] Staff survey results (either the Internal Survey for Employees, or any other staff survey for gender mainstreaming)
- [ ] Budget breakdowns for internal policy development/trainings
- [ ] ToRs of Gender Team
- [ ] Annual internal gender assessment/audit/Scorecard scores (either COL's Gender Scorecard or any other gender assessment completed annually)
- [ ] Data on the following (gender disaggregated where possible):
    - [ ] Number of harassment complaints received
    - [ ] Number of harassment complaints resolved
    - [ ] Number of staff by level of responsibility, position, department
    - [ ] Number of members of board of directors
    - [ ] Contract types
    - [ ] Wages
    - [ ] Number of employees eligible for paternity/maternity leave
    - [ ] Number of employees who use paternity/maternity leave
    - [ ] Number of employees eligible for flexible hours
    - [ ] Number of employees who use flexible hours
    - [ ] Number of applicants for job positions in the past year
    - [ ] Number of new hires
    - [ ] Number of people nominated/considered for promotion
    - [ ] Number of people promoted

- [ ] Policies on the following:
    - [ ] Harassment policy
    - [ ] Extended Leave Policy
    - [ ] Paternity Leave Policy
    - [ ] Maternity Leave Policy
    - [ ] Flexible hours policy
    - [ ] Hiring policy
    - [ ] Promotion policy

Section Two: External Assessment

Examples

- [ ] Gender equality Action Plan or Roadmap for gender mainstreaming outputs
- [ ] Mission statement for 'outward facing' or external, programming, projects, services, or curricula, sometimes referred to as organisational/institutional outputs.
- [ ] Budget for external gender mainstreaming development/training
- [ ] Registrations for gender mainstreaming trainings
- [ ] Internal Survey for Employees (or other staff survey) results
- [ ] Organisational/institutional programme budgets
- [ ] Gender needs analysis research reports, fact-finding mission reports, or studies
- [ ] Project proposals/summaries
- [ ] Approved project summaries
- [ ] Donor reports (if relevant)
- [ ] Qualitative surveys/interviews/studies with beneficiaries (if relevant)
- [ ] Data on the following (gender disaggregated where possible):
    - [ ] Outcomes/surveys and/or interviews and with the number of beneficiaries
    - [ ] Number of project participants/learners

Appendix III:
Internal Survey for Employees

The Internal Survey for Employees should be completed individually and anonymously by at least 50% of an organisation's/institution's staff/employees prior to the Gender Scorecard scoring workshop.

Before you get started, see some definitions below that may be helpful for filling out the survey.

Key Terms:

Gender: The social and cultural construction of roles, behaviours, expressions, and identities of people in diverse societies. Gender is not determined by biological sex, but rather by how individuals and groups understand, define, and experience it.

Inclusive language: Language that respects and values the diversity of people and their gender and sexual identities. It avoids words or expressions that might exclude, hurt, or offend anyone. It uses terms and pronouns that people choose for themselves.

Recruitment processes: refer to the systematic series of steps and activities that organizations follow to identify, attract, evaluate, and hire qualified candidates for job openings. An effective recruitment process is crucial for finding the right talent to meet an organization's needs.

Socio-economic backgrounds: The positions or classes of individuals or groups in society based on a combination of social and economic factors, such as income, education, occupation, and place of residence.

Gender equality: Equal rights, responsibilities, and opportunities for everyone, regardless of their biological sex. It does not mean that girls/women and boys/men will become the same but that their interests, needs and priorities are considered equally important while recognising the diversity of different groups. Gender equality is a human rights issue as well as a precondition and indicator of sustainable, people-centred development.

Gender mainstreaming training: educational programs designed to promote and facilitate the integration of gender considerations into all aspects of an organization's policies, programs, and activities. The goal is to ensure that gender equality and equity are central to an institutions/organization's decision-making processes and that gender-based disparities are addressed and eliminated.

Harassment: Any unwanted or offensive behaviour that makes someone feel uncomfortable, humiliated, or threatened

Sexual harassment: Unwelcome sexual advances, requests, or conduct — from anyone, regardless of status — affecting the safety or dignity of women, men, boys, and/or girls. It can be physical or verbal and includes character assassination through graffiti or gossip that refers, accurately or otherwise, to a person's sexual behaviours, among other actions.

Compensation policies: Strategies and guidelines that institutions/organisations develop and implement to determine how they will remunerate their employees for their work and contributions, which is an important component of overall human resources management. It can significantly impact its ability to attract, retain, and motivate talent.

Fair wage policy (fair pay policy or fair compensation policy): A set of principles and guidelines that an organization adopts to ensure that its employees are paid fairly for their work. The aim is to create a compensation structure that is equitable, transparent, and aligned with the organization's values and objectives.

Maternity leave: A period of authorised absence from work that is granted to pregnant employees or new mothers to allow them time to give birth, recover from childbirth, and care for their newborn or newly adopted child.

Paternity leave: A leave of absence that is granted to fathers to allow them to be present and actively involved in the care of their newborn or newly adopted child.

Professional development: The process of gaining new skills and knowledge to advance your career. It's important for both individual growth and creating a positive organizational culture. Key organizational aspects include determining competencies, skill assessment, employee contribution and ownership, written Action Plan, measurable outcomes aligned with organization goals, strategy implementation follow-up, and supervisor/manager involvement.

Internal Survey for Employees Questions

This survey is intended for staff to evaluate how well the organisation/institution is doing on integrating gender considerations – Human Resource policies, programmes/projects, curricula, etc.

Reset Form

		Score options	Indicate a score
1.	All of the organisation's/institution's material/advertising uses inclusive language (internal and external documents avoid stereotypes; men and women from all backgrounds are visible; and language is non-sexist)	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
2.	All communications/advertising materials are designed to be accessible to both men and women from different socio-economic and ethnic backgrounds	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
3.	The organisation/institution has communicated a commitment to gender equality to all staff members	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
4.	The organisation/institution has communicated a commitment to gender equality to all external/public audiences	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
5.	The organisation/institution has recruitment targets for the promotion of gender equality at all staffing levels (entry level to senior management) and in every area	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
6.	The organisation/institution has recruitment processes designed to encourage under-represented genders to apply	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
7.	All people are hired through a formal and documented process that includes an interview panel with equal numbers of men and women	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
8.	All staff members, regardless of gender, have equal opportunities for promotion	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	

Use the key below to answer the questions in the survey.

1 = No/not sure

2 = Partially/sometimes

3 = Yes/always

		Score options	Indicate a score
9.	There is a policy that specifically prohibits discriminatory recruitment/hiring processes	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
10.	Recruitment/hiring practices are equal for men and women	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
11.	The organisation/institution is fair and objective in its assessment of employee performance	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
12.	Mechanisms (processes/practices) exist to ensure promotions are based on performance evaluations and are without gender bias	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
13.	Mechanisms (processes/practices) exist to ensure both men and women have access to promotions and professional development opportunities	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
14.	Women are supported to pursue decision-making positions	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
15.	Mechanisms (processes/practices) exist to ensure both men and women are equally represented among candidates being considered for promotions	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
16.	Capacity-building training available for all staff regardless of gender	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
17.	Staff trainings are organised to accommodate family responsibilities and ensure that all employees can participate	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
18.	The organisation/institution offers gender trainings conducted by specialised professionals for all staff at all levels	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
19.	The organisation/institution offers gender mainstreaming trainings for all staff at all levels	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
20.	Compensation policies explicitly ensure that women and men receive equal pay for equal work	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	

		Score options	Indicate a score
21.	Compensation policy is transparent, and information is clearly communicated to all staff members	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
22.	The organisation/institution has a fair wage policy that accounts for gender equality	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
23.	All staff is informed about what constitutes harassment and there is prohibition of harassment in the workplace	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
24.	Organisational/institutional policy has been developed and shared with all staff to eliminate and prevent sexual harassment	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
25.	All staff members are required to partake in annual trainings on workplace harassment	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
26.	All staff members know the workplace harassment protocol and who to report to if necessary	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
27.	The organisation/institution keeps track of, monitors, and follows up on any harassment cases brought forward	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
28.	Having children does not impact an individual's ability to keep their job	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
29.	The organisation/institution provides maternity leave	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
30.	The organisation/institution provides paternity leave	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	

		Score options	Indicate a score
31.	The organisation/institution promotes both men and women caring for children	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
32.	Childcare services are provided by the organisation/institution (day care, financial subsidies, summer/holiday support, etc.)	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
33.	Options for flexible working hours or the possibility of working remotely is available for staff	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	
34.	Staff can request absences within working hours for family needs	*1 = No/not sure* *2 = Partially/sometimes* *3 = Yes/always*	

This section (below) is intended for Gender Team or Gender Consultant only. It applies to the "Results" section in the Scorecard.

1. Add up the score from questions 1 to 34.
2. Find the score in the scale and corresponding Level.

Score:	*34-56*	*57-79*	*80-102*
Level:	*1*	*2*	*3*

SCORE 0

LEVEL

Appendix IV: Completing the Gender Roadmap or Action Plan

To help complete the Gender Roadmap (Action Plan), use the explanation provided below.

Column 1: Performance indicators

Identify all the indicators in the Gender Scorecard assessment which the organisation/institution scored as 1 or 2, and then list them in column 1. Add as many rows as necessary.

Column 2: Next steps

List the next steps the organisation/institution can take to promote gender equality in column 2. These can be derived from the Level 3 indicators in the Scorecard.

Column 3: Timeline

Determine a deadline for the completion of the steps identified in the second column. Note these deadlines in column 3. The following is a general guideline for appropriate timelines:

- *Action Plans* should be developed within 3 months of completing the Gender assessment/survey.
- *policies* should be developed within 6 months.
- *gender evaluations* should be completed in 1 year.
- *budgets* should be confirmed by the next quarter. Gender mainstreaming project proposals/summaries should be completed on a continuous basis.

Column 4: Person(s) responsible

Assign a person/s who will be responsible for the implementation and reporting of the follow-up steps noted in the second column. Identify this person/s in column 4.

Column 5: Means of Verification

Determine, then record, the evidence or Means of Verification that will be provided to verify that the follow-up actions/steps have been successfully completed.

Types of evidence can be derived from the requested evidence/Means of Verification in the Scorecard.

Column 6: Budget

For each action item (Next Steps), enter the required resource allocation. These should include organisational/institutional staff compensation (wages), all logistical arrangements (venue for holding workshops/meetings/training, catering, printed and other materials, etc.)

Completing the Gender Roadmap worksheet:

1. **Identify the specific indicators** scored as 1 or 2 from the Scorecard.
2. **List the distinct measures** that your organisation or institution can implement to advance gender equality, utilising the current score as a baseline. Additionally, outline the sequential steps required to progress towards an enhanced gender equality score, as illustrated in the "Example of Gender Roadmap/Action Plan" below.
3. **Provide deadlines** for the completion of the steps identified.
4. **Identify staff** member/s responsible for implementation and reporting.
5. **Identify the Means of Verification** to verify that the steps have been successfully completed.
6. **Provide an estimate** of the financial/human resources that will be needed to carry out each activity.

Example of Gender Roadmap/Action Plan

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Performance indicators with scores of 1 or 2 (insufficient)	**Next steps** (derived from indicators in Level 3 rankings)	**Timeline for completion**	**Person/s responsible**	**Means of Verification**	**Budget**
1.3 No harassment policy OR the harassment policy has not been reviewed/updated in the last year	*Develop a harassment policy, and ensure that it is updated annually and distributed widely*	*By July 30, xxxx*	*Gender Equality Manager*	*Copy of policy; memo or email disseminating it to staff*	*$ xxxx*
2.3 No evaluation of projects/policies/ curricula or no gender specific evaluation of programmes/projects/ policies/curricula	*Complete gender specific evaluation of all projects/ policies/curricula*	*By June 30, xxxx*	*Programme Managers, External consultants*	*Copies of impact studies with gender focus*	*$ xxxx*

Appendix V: Gender Roadmap/Action Plan: Template

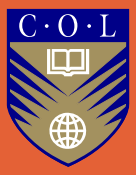
Reset Form

Using the Scorecard results, fill in the template (Action Plan).

Institution: _____ Date created: _____ For the period: _____

Performance indicators with scores of 1 or 2 (insufficient)	**Next steps** (derived from indicators in Level 3 rankings)	**Timeline for completion**	**Person/s responsible**	**Means of Verification**	**Budget**

Performance indicators with scores of 1 or 2 (insufficient)	**Next steps** (derived from indicators in Level 3 rankings)	**Timeline for completion**	**Person/s responsible**	**Means of Verification**	**Budget**



4710 Kingsway, Suite 2500
Burnaby, BC V5H 4M2
Canada

Tel: +1.604.775.8200
Fax: +1.604.775.8210
E-mail: info@col.org
Web: www.col.org

February 2024