



CENTER FOR INCLUSIVE  
BUSINESS AND LEADERSHIP  
FOR WOMEN | CIBL



# NEEDS ASSESSMENT

Phase 1



Engage in policy-  
identification meetings

Phase 2



Identify policies  
for implementation

## Step 2: Conduct a Needs Assessment

When exploring the HR policies and practices of different employers that are committed to inclusive HR systems, we note that there is a wide variety of policies and practices that have been adopted. The possibilities are many. When engaging in your policy formulation and implementation process, one of the first objectives is to narrow down the focus to key policies of interest that are specifically related to the better recruitment, retention, and/or promotion of women in your organization.

A useful way to think about the task at hand is in terms of a general internal gender auditing of HR policies. The broad question, from this perspective, is to what extent does your organization's HR system (whether informal in small enterprises or more formalized in medium and large employers) foster gender equality internally within its recruitment, retention and promotion (RRP) policies and practices. It is important to think about fairness and gender equality as it relates to organizational, managerial structures, as well as the internal work norms and culture. In this regard, it is vital to think about the extent to which women are equitably treated regarding RRP within your organization, and about a few key areas in which the organization would like to focus its efforts to improve the policies relating to removing inequalities in recruitment, retention, and/or promotion.

The aim is to work in partnership with the different stakeholders of your organization to take a few positive steps forward in establishing gender-inclusive human resource policies with particular strategic considerations for improvement in recruiting, hiring, retaining and promoting women.

This document describes a two-phased approach to identifying policies. The first phase involves preparing for and engaging in policy-identification meetings with the aim of identifying current gaps and potential areas for development. The second phase involves the actual identification of the necessary policy, or set of policies for implementation.

## Phase 1: Engage in Policy-Identification Meetings

Before you sit down to meet, it is important to ensure to some degree, that there is a political will from the leadership to improve the RRP of women, and clear commitment to support gender equality within your organization. You can refer to Step 1 in our CIBL Roadmap on how to create a DEI team that will lead this change and ensure its successful implementation.

Now that you have rounded up your DEI team, it is time to delve into a needs assessment process in order to identify key policy areas to draft and implement.

The process will entail a series of [Policy-Identification Meetings](#) with the DEI team and other relevant stakeholders. These meetings may need to be scheduled multiple times (e.g., 2-5 different meetings). Each meeting will have the primary objective to explore possible policy areas for change.

Consider the following general guidelines as you prepare and undergo the series of meetings.

### 1.1 Reflect on the overall direction and objectives of the meetings:

In preparation for these meetings, the DEI team needs to reflect on the following [Broad Reflective Questions](#):

- How is gender equality addressed in your organization? Is there broad support or internal resistance to the concept? Has leadership committed formally?
  - Are there any gender-programs or women's empowerment programs already in existence at the organization?
  - Do the employer representatives (preferably the HR manager or equivalent) feel they have adequate understanding of RRP policies or gender-inclusive HR policies to address gender (in)equalities in HR activities?
  - To what extent are the RRP policies already included in your HR policies and practices?
- Are HR indicators and data collection already reported on in a gender disaggregated manner?

- Is there an available budget for activities designed to achieve gender equality at your organization?

### 1.2 Prepare and review your agenda prior to each meeting:

- Prepare a specific agenda for each meeting.
- Prepare any necessary material that will help guide the conversation for each meeting.
- Prepare any broad reflective questions you will have to think about during each meeting, such as the broad questions listed above.
- Schedule a meeting time that works for everyone to attend and be sure to allow ample time for discussion and exploration.

### 1.3 Prepare data or facts about the organization for reference materials

- Become more familiar with specific aspects of your organization before the meeting. For example, try to get a better sense of the demographic makeup of the employees, specifically when it comes to gender ratios across departments and hierarchical levels. Consider collecting any documents that might be of relevance to you, such as existing policies (if any), employee handbooks, and other information relating to the organization's mission, vision, values, and goals.

Note down all information that is missing. Key areas of missing information may help guide the conversation about RRP, and can help you also ask relevant questions in the meetings. Refer to the [Gender-Inclusive Policy Audit \(GIPA\)](#) as a guide on assessing gender inclusivity in your organization. Each member of the DEI team should fill out the GIPA on their own to allow for comparison of viewpoints.

### **1.4 Identify gaps and barriers in the current recruitment, retention, and promotion processes:**

Based on the data and information collected in the GIPA, you should have a clear picture now of the gaps in the current processes at your organization.

For example, if the demographic data of the organization shows that the split between women and men are roughly equal, but that out of the 10 executives in the organization, only 2 are women, then you might want to focus on policies around promotion areas. If the data shows that turnover rates for women are higher than men, then you might want to focus on policies around retention. The second phase of the needs assessment is to browse through the [menu of policies](#) in order to determine which policies you want to adopt and implement.

You might also already have potential policy change areas that you have been wanting to improve, change, or draft.

## **Phase 2: Identify 2-3 Policies for Implementation**

### **2.1 Browse through the SAWI Menu of Potential RRP Policy Change Areas**

There are many different policies that can fall under recruitment, retention, and promotion. Our SAWI menu showcases a range of HR-policies that have a track-record of improving the inclusivity of HR systems in the region and globally. The menu is meant to serve as a reference for you by providing a broad listing of possible areas of focus for potential HR policies to implement.

### **2.2 Select 2-3 Policies for Implementation**

Be specific about the focus on policies that are directly related to improve the RRP of women in your organization. Based on our previous work with employers, we suggest narrowing it down to 2 to 3 policies to focus on implementing. Once the area of policy change is clearer, specific HR-guidance materials can be developed and shared to give a background on best practices and on regional customization. Most importantly, sample policy templates can be developed to help guide the drafting or amending of particular HR policies relevant for RRP. As part of the SAWI Project, we have a database of policy templates that organizations can choose from and customize, developed by our HR experts. Reach out to us for more information on how you can access these templates.

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**GENERAL DISCLAIMER:** The Policy Templates and materials related to the SAWI Project are intended to assist employers, HR managers, and other decision-makers as they strive to improve workplace policies and practices related to more inclusive recruitment, retention, and promotion (RRP) within their organization. While we have made every attempt to provide templates relating to HR policies that are accurate and draw from a broad range of regional and international standards, it is not possible to include the technical detailing nor the discussion of everything necessary to ensure a gender-inclusive RRP working environment in a presentation of this nature. Thus, the information provided by the SAWI Project, its staff, and partners must be understood as a tool for addressing workplace policies, rather than an exhaustive statement of an employer's legal obligations, which are defined by statute, regulations, and standards of their local industry standards, and national legislative landscape. Likewise, to the extent that this information references practices or procedures that may enhance inclusive RRP, but which are not required by a statute, regulation, or standard, it cannot, and does not, create additional legal obligations. Finally, over time, regulators may modify rules and interpretations in light of new technology, information, or circumstances; to keep apprised of such developments, or to review information on a wide range of inclusive HR topics. All information, toolkits, templates, and other related material under the SAWI project is provided therefore as a free of charge guide, and is, therefore "as is" without warranty of any kind of risk."