



Mainstreaming Gender Smart Investment Strategies among Institutional and Commercial Investors in Latin America

Alterna – Guatemala



ABOUT THE ACTOR

Alterna, based in Guatemala, is the premier Center for Innovation and Social Entrepreneurship in Central America. Alterna is a social innovation platform that promotes the development of entrepreneurs and conscious companies from complex or isolated contexts with business models that aim to close social gaps, solve environmental challenges, and have a positive impact in their ecosystems, as a path towards a sustainable region.

Alterna seeks to cultivate (to grow, develop, and promote impactful business models) and enhance innovative business models to connect them with capital, solutions and markets, and serves as a platform to foster trust, increase visibility and share success. Alterna’s methodology aims to help businesses to create sustainable impact plans, originate connections that contribute to reducing decisive social and environmental gaps, and develop opportunities that are real breaking points for the generation of structural changes.



55% of Alterna’s advisory board are women



33M dollars generated in sales by the cultivated entrepreneurs



43% of the entrepreneurs cultivated by Alterna are women



+1.2M people directly impacted through the social benefits generated by the cultivated businesses

OVERVIEW OF THE TECHNICAL ASSISTANCE PROJECT

The **USAID**-funded project *Mainstreaming Gender Smart Investment Strategies among Institutional and Commercial Investors in Latin America, implemented by Pro Mujer and Acrux Partners*, consists of a technical assistance (TA) component that aims to support diverse financial sector actors to recognize gender gaps in both their internal and external business activities that can prevent the full inclusion of diverse and minority women’s access to financial services, capital or institutional decision-making processes. Pro Mujer and Acrux Partners selected leaders from across Latin America’s financial market at various stages in their development and incorporation of gender lenses in their investment strategies, organizational practices and financial and non-financial products and services. Alterna was selected as part of this project, due to their catalytic and influential presence in the region supporting entrepreneurs business growth and positively impact local economies. The tailored technical assistance focused on training Alterna’s teams to create safe and inclusive workplaces, by providing training and offering tools and resources to prevent and respond to cases of harassment and workplace violence and/or sexism, and to complete their previous efforts to ensure inclusive participation in workshops and daily activities.



METHODOLOGY

To identify the institutional needs in terms of gender mainstreaming, Pro Mujer and Acrux Partners' methodology for Alterna included the following stages:



PROJECT ACTIVITIES

The following activities were implemented with Alterna over the course of one month:

Preliminary Sessions	General Workshop	Implementation Workshop 1	Implementation Workshop 2	Implementation validation
<p>Dialogue with Alterna to:</p> <ul style="list-style-type: none"> Identify specific needs and structure the work plan. Design of value proposition, content agreement and outline training. 	<p>Workshop (1.5 hour) on creating safe and inclusive workspaces with a Gender, Diversity, Equity and Inclusion (GDEI) perspective to define concepts, and actionable measures on workplace harassment, bystander intervention, and equal participation.</p>	<p><i>Cultivation team</i> Practicing the concepts learned in the general workshop. Brainstorming based on Alterna's experience to identify existing and non-existing policies and actions for improvement.</p>	<p><i>Operations team</i> Practicing the concepts learned in the general workshop. Brainstorming based on Alterna's experience, to identify and design new metrics and indicators aimed at ensuring safe and inclusive workspaces.</p>	<p>Presentation of the final outputs: two roadmaps with examples and practical recommendations; one case study summarizing the activity and showing the most relevant results and recommendations.</p>

CHALLENGES

During the initial scoping process and the qualitative data collection stage, the following institutional challenges were identified:

- 01** Difficult to create a clear policy to guarantee safe and inclusive workspaces without proper definitions.
- 02** Hard to understand the importance of incorporating gender and diversity perspectives from an intersectional approach (gender, race, income).
- 03** Challenging to identify existing resources within the institution to prevent, address and act in case of harassment, violence or unequal participation in their workshops.
- 04** Difficult to design new innovative tools to fill the existing gaps that prevent workspaces from being safe.

SOLUTIONS

In close collaboration with Alterna, during the TA sessions, the following solutions were identified by Pro Mujer and Acrux Partners to respond to the challenges:

- 01** Training for teams in the construction of safe spaces with a gender and diversity perspective, emphasizing the importance of intersectionality.
- 02** Support the development of mechanisms and tools to prevent, approach, and act in situations of harassment, violence or unequal participation in the workshops.
- 03** Benchmarking of success stories and good practices in the creation of safe workspaces, free of gender-based violence.
- 04** Implementation of MEL strategies to assess the effectiveness of the measures implemented.



STRATEGIC SUPPORT

The technical assistance aimed to support Alterna's initial strategic priority to generate and disseminate knowledge about how to incorporate an understanding, definition and policy around safe spaces.

TARGET

Alterna staff, focusing on teams that conduct the cultivation workshops, MEL, and operations (20 people approx.).

GENERAL OBJECTIVE

To identify good practices in the creation of safe and inclusive workspaces and integrate them into the methodology applied in Alterna's Cultivation Workshops, as well as in the organization's work dynamics to develop an official ethics policy and a policy against harassment and bullying.

TRAINING

The trainings were designed using a theoretical and practical approach according to the needs and tools previously identified. Project partners created trainings with participatory methodologies and gender equity perspectives. The three one-hour sessions focused on creating safe and inclusive spaces free of harassment or gender-based violence.

HIGHLIGHTED TIPS

Ensuring safe spaces: Efforts should be made to avoid workplace attitudes that promote violence in the workplace (e.g., avoid "tone policing", "derailing" or "gaslighting") or gender-based violence (e.g., sexist comments, abusive or harassing behavior). Risks that threaten the physical or emotional health of any team member or workshop participant (especially women and minorities), must also be addressed and anticipated. Staff or participants must be trained on prevention, action and containment measures in situations of harassment and abuse.

Conceptualizing harassment: It is necessary to raise awareness on the types of harassment, how to identify and prevent them which will create safer workspaces, and have a positive impact on business culture. All of the above must consider contextual variables, where there may be - to a greater or lesser extent - a lack of knowledge about the concepts related to the gender approach.

Actions to be taken: Strategies should be established for three moments of harassment and/or abuse; highlighted below:

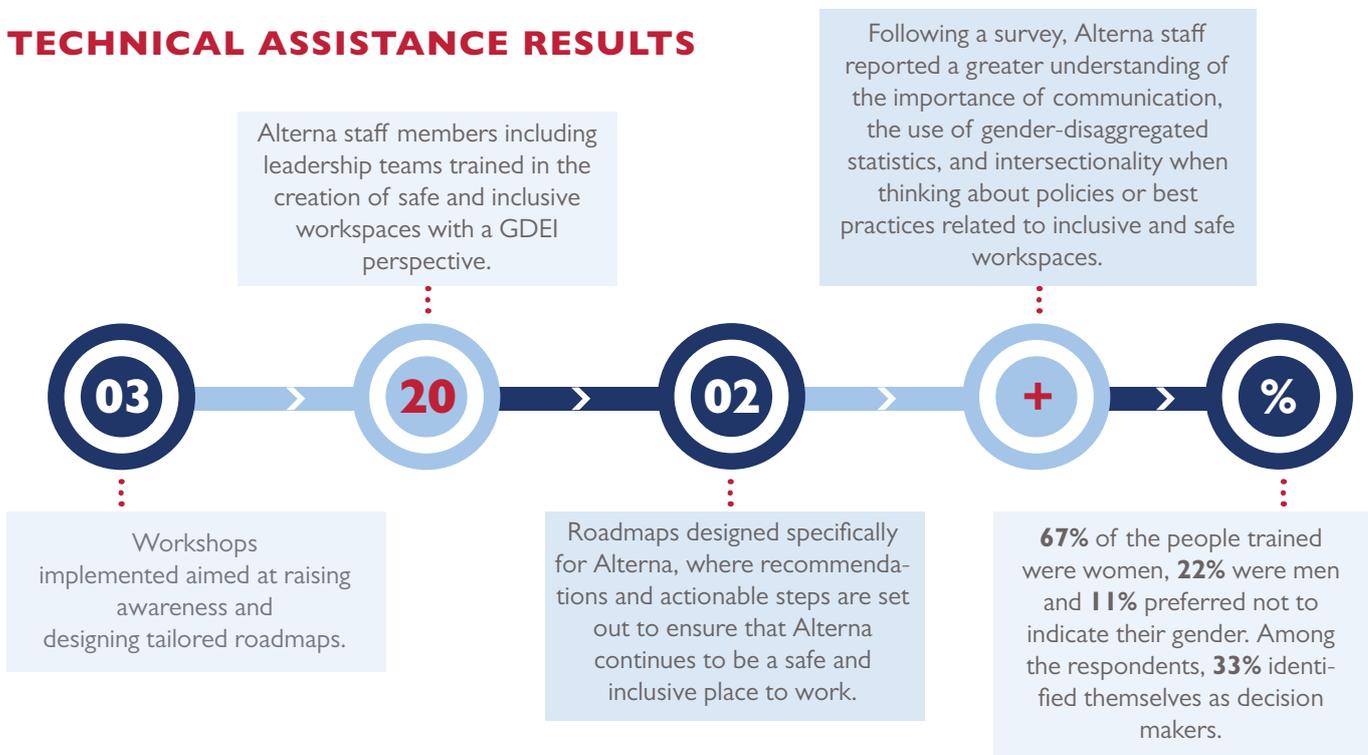
- **Preventive actions:** generate guidelines, protocols, codes of ethics and action plans; conduct diagnostics and formulate indicators; train and sensitize personnel; create secure, confidential and impartial prevention and reporting mechanisms; create a committee in charge of the issue.

- **Actions during the occurrence of harassment situations:** create effective communication channels; activate the harassment procedure; generate periodic sessions in the Committee to identify harassment.

- **Actions after the harassment event and follow-up:** assertive communication with the victim avoiding that the person loses confidence/security/sensation of support (use questions such as: how do you feel at this moment?; do you feel you can return to your workplace?); communication of the facts while maintaining anonymity for their respective prevention.



TECHNICAL ASSISTANCE RESULTS

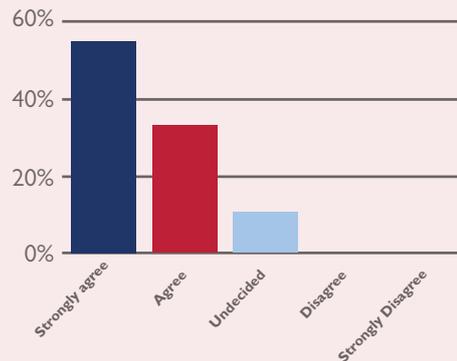


LESSONS LEARNED

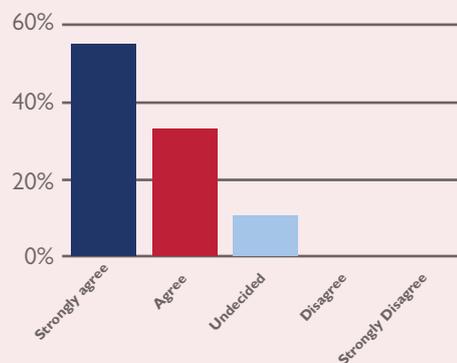
- 01** Make workshops practical, and offer corresponding tools to address challenges.
- 02** Establish expectations early on what works well, for whom, in what circumstances, and whose priorities will shape the agenda.
- 03** Build on existing strategies, as it facilitates the identification of shortcomings and makes the workshops and recommendations more effective.
- 04** Highlight the importance of preventing and mitigating harassment cases and be ready to contain in case it happens.

Post-project surveys revealed an increase in participants' gender awareness and skills:

My understanding of the key concepts of safe spaces has increased:



I am more aware of the importance of ensuring safe spaces at work (from equal participation, gender-based violence and bystander intervention).



CONCLUSION

Through these TA sessions, Pro Mujer and Acrux Partners have supported Alterna as a catalytic financial actor operating in Central America to better recognize situations that women may face in the workplace and take more clear preventive actions. In this way, Pro Mujer and Acrux Partners seek to guarantee effective attention before, during and after harassment situations, mainly through staff training, awareness raising, implementation of guidelines and protocols, and assertive communication.

The consultancy has created a space for exploration and analysis of Alterna's situation in terms of gender mainstreaming, and has provided successful results for the organization, strengthening its capacities and resources to guarantee safe and inclusive workspaces. The consultancy allows Pro Mujer and Acrux Partners to communicate the results to ensure that the work with Alterna has a catalytic effect in the region and that its example can serve as a model for other organizations in Latin America.



Interested in learning more about gender mainstreaming?
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