

Module 3

GENDER MAINSTREAMING IN ORGANISATION

MODULE OVERVIEW

TIME: 2h 40 minutes

OBJECTIVES:

- ♦ To understand concept of gender mainstreaming and apply it to your own organisation.
- ♦ To get familiar with the steps and tools for assessing the level and capacity of an organisation for gender mainstreaming.
- ♦ To identify strategic entry points and ways for the organisation to mainstream gender into their work.
- ♦ To prepare a basic plan for institutional gender mainstreaming.

MODULE OVERVIEW:

SESSION	
1. Introducing gender mainstreaming	15 min
2. Institutional gender mainstreaming	15 min
3. Institutional gender assessment	60 min
4. Comprehensive organisational gender assessment	30 min
5. Preparing an action plan	40 min

MATERIALS NEEDED:

- ♦ Flip charts, markers
- ♦ Power Points PP3.1 - PP3.16
- ♦ Copies of Institutional Assessment Checklist (Annex 3.1)
- ♦ Copies of Comprehensive Institutional Gender Assessment Template (Annex 3.2)
- ♦ Copies of Action Plan Form (Annex 3.3)

INTRODUCING GENDER MAINSTREAMING

AIM: To understand the concept of gender mainstreaming and its basic characteristics.

TIME: 15 min

MATERIALS NEEDED: Flip charts, markers, Power Points PP3.1-3.4

STEP BY STEP GUIDE

- Step 1 Ask participants what they understand under the term *gender mainstreaming*?
- Step 2 Ask participants what they think are the practical steps or elements of mainstreaming gender into e.g. organisation, policy, programme, project?
- Step 3 Follow up the discussion with the presentation on key characteristics of gender mainstreaming, using PP3.1-PP3.2. **PP3.1**
PP3.2

GENDER IN DEVELOPMENT THEORIES

- Step 4 Ask participants, if they know what are the origins of gender mainstreaming approach?
- Step 5 Present participants with the PP3.3 and PP3.4, presenting the different global Conferences on women and explaining the different approaches in dealing with women and gender in development (WID, GID and gender mainstreaming approach). **PP3.3**
PP3.4
- Step 6 Continue exploring gender mainstreaming, by asking participants:
 - ♦ What are practical steps to carry out gender mainstreaming?
 - ♦ What are the elements of gender mainstreaming?
 - ♦ What they think are challenges with gender mainstreaming approach?
- Step 7 Write any relevant issues on flipchart.
- Step 8 Wrap up the discussion showing PP3.5. **PP3.5**

FACILITATOR'S NOTE

Key characteristics of gender mainstreaming:

- ♦ A globally accepted strategy or an approach for promoting gender equality.
- ♦ Recognizing interdependent or complementary roles of men and women, one affecting another.
- ♦ Aim to transform unequal relationships between genders and the structures that produce inequality.
- ♦ Gender issues addressed across the “mainstream”/“normal”, institutional activities, taking place on all levels and all stages of programming cycle.
- ♦ Responsibility for gender spreads across organisational structures.

Gender mainstreaming as a strategy emerged from the evolving experience gained from the “Women and Development” and “Gender and Development” approaches during the 1980s, which brought unsatisfactory results in achieving gender equality.

Different Development Approaches

WOMEN-IN-DEVELOPMENT	GENDER-IN-DEVELOPMENT	GENDER MAINSTREAMING
Aiming to counteract the exclusion of women from development processes	Aiming at redressing the unequal relations of power that prevent women's full participation. Focus on the relations between men and women.	Addressing gender issues across all sections, sectors, levels in any planned action, including legislation, policies or programmes, in all areas and at all levels.
Women-specific projects exclude men and treat women's problems in isolation to their relations with men, in both the private and the public sphere.	Targeted interventions” that have as their primary goal the narrowing of gender gaps that disadvantage women.	Gender addressed as part of mainstream, “normal” institutional activities, e.g. brought into the “mainstream” of activities.
Left to specialised women's institutions.	Left to specialised women's institutions.	Responsibility spread across organisational structures, rather than concentrated in specialized units.
Addressing practical needs.	Addressing strategic needs.	Addressing strategic needs.
Example: special women's projects, designed to increase women's productivity or income, or to help ease their domestic responsibilities.	Example: training to sensitize the judiciary on domestic violence or rape, or training for male politicians on discriminatory practices against women in politics, or research on unequal effect of trade policies on women.	Example: gender is integrated in a general energy policy, taking into account needs of women and men.
IMPORTANT NOTE! There is still a need for a dual strategy – gender mainstreaming complemented with projects and measures designed to address specific gaps or problems faced in the promotion of gender equality and women's rights.		

Practical implications of gender mainstreaming involve: gender analysis, gender budgeting, gender audits, ensuring equal participation.

Critical questions linked to gender mainstreaming:

- ♦ **Gender mainstreaming as merely rhetoric?** Often lip service substitutes for practical reasons.
- ♦ **Will it undermine what has been done until now?** Fear that targeted gender affirmative actions will have less funding because of re-shifted focus on gender mainstreaming.
- ♦ **Will it be enough?** Focus on “equality for women and men” without shifting or critically analysing current development practices and models.
- ♦ **Another “top-down” approach?** A technical, bureaucratic issue promoted from above.
- ♦ **Where are the guidelines?** Lack of tools, guidelines, best practices in gender mainstreaming.

Inspired by UNDP, 2004

MAINSTREAMING GENDER INTO YOUR ORGANISATION – Institutional Gender Mainstreaming

AIM: To introduce participants with the Institutional Gender Mainstreaming

TIME: 15 min

MATERIALS NEEDED: Flip charts, markers, Power Points PP3.5 – PP3.8

STEP BY STEP GUIDE

- Step 1 Introduce participants with institutional gender mainstreaming, asking them the following questions: **PP3.6**
- ♦ Do they have to or did they have to address gender issues in their own work? In what way? Ask them to give examples.
 - ♦ Are gender issues important for their organisation or all sections of your organisation?
 - ♦ What are the principal challenges in integrating gender into their work?
- Step 2 Continue discussion by asking them:
- ♦ What they think that “institutional gender mainstreaming” is?
 - ♦ What are the principal entry points or opportunities for addressing gender issues in the organisation? How can organisation do that?
 - ♦ How can you see that organisation is mainstreaming gender into its work?
- Step 3 Using the PP3.7, present the participants with the basic information of the gender integration frameworks and institutional gender mainstreaming. **PP3.7**
PP3.8

FACILITATOR'S TIP

Possible challenges with gender mainstreaming, which participants might note: lack of time, low priority, too many other responsibilities, lack of budget, lack of skills/knowledge on gender, lack of easy-to-use tool kits, check lists, good practice examples, lack of demand for gender mainstreaming, lack of support from their manager, lack of training or background in gender, “never thought about it”, no need for that, etc.

FACILITATOR'S NOTE

Institutional gender mainstreaming is a process of building organizational capacity and ownership to attain gender sensitive programming, organizational structures, and procedures. It has external (gender mainstreaming in programmes, services) and internal dimension (in organisational policies and structures) (HREA, 2014).

GENDER INTEGRATIONAL FRAMEWORK**POLITICAL WILL**

Top-level leadership/managers (publicly) support the issue of gender equality and follow up its implementation. Reflects in staff time and financial resources, institutionalised policies and procedures to mainstream gender, e.g. gender policy, budget allocations, showing public support in speeches and written communication, etc.

TECHNICAL CAPACITY	ORGANISATIONAL CULTURE	ACCOUNTABILITY
Staff skills in gender analysis.	Gender balanced staff and governance structure.	“Shows if we are walking the talk.”
Adoption of systems for gender disaggregated data.	Equal valuing of women and man in the workplace.	Set and assess annual targets for implementation of gender strategy.
Development of gender sensitive tools and procedures.	Patterns of behaviour and codes in organisation.	Incentives and rewards.
	Communication on gender equality.	Gender equality as part of job descriptions, work plans, and performance assessments.

Adopted from InterAction’s Commission on the Advancement of Women

INSTITUTIONAL GENDER ASSESSMENT CHECK LIST

AIM: To assess the level of gender mainstreaming in participants’ organisations and to get familiar with some of the key elements of institutional gender mainstreaming.

TIME: 40 min

MATERIALS NEEDED: Institutional Assessment Checklist (Annex 3.1), flip charts, markers, Power Points PP3.9-3.11

STEP BY STEP GUIDE

- Step 1 Introduce the topic, asking participants the following questions:
- ♦ Have they ever been involved in an organisational assessment procedure?
 - ♦ What form did it take? What are their experiences with organisational assessment? Was gender an issue?
- Step 2 Introduce the topic of institutional gender assessment to the participants, using the PP3.09- PP3.10 **PP3.09
PP3.10**
- Step 3 Hand to each participant a Institutional Assessment Checklist (Annex 3.1) and ask them to take 15 minutes to fill the forms out.
- Step 4 Give them instructions to fill in the form: For each of the 20 statements (organised into four different aspects of gender capacity and readiness) they should assess the degree to which these elements are present in their organisation by rating them from 1 (to a very small degree) to 5 (to a great degree). **PP3.11**
- Step 5 After 15 minutes ask them how did they find this exercise? How would they assess the level of gender mainstreaming in their organisation?
- Step 6 After the brief discussion, ask them to calculate their ratings and divide the sum they got by the number shown in the checklist. Inform them that that is their assessed score for the level of gender mainstreaming in their organisation.

FACILITATOR'S TIP

The checklist is a simplified version of institutional gender mainstreaming, which was developed by InterAction's Commission on the Advancement of Women and adopted by the Australian Red Cross (as a scoring matrix).

Checklist assessment can be useful as a starting point for discussing general conditions required for mainstreaming gender in selected organisation. Ideally it should be done in a group or in a workshop involving colleagues of different profiles (managers, programming team, etc.). This will allow you to discuss each question, gather different points of views and define next steps.

FACILITATOR'S NOTE**DEFINITION**

Institutional Gender Assessment is the tool that enables organisations to get to know the gender mainstreaming situation in all areas and all levels of an office's work; that is, to what degree this process has penetrated the organization's different levels and actions (UNDP, 2004).

BENEFITS

It can be used to improve the level of integration of gender into processes and policies, identify existing capacities and gaps, provide baseline for monitoring and measuring the progress in institutionalisation of gender mainstreaming, promote gender equality and enhances collective capacity of organisation, create greater ownership of the process and greater collective responsibility.

OUTPUTS

A key output is the establishment of processes and procedures to support gender mainstreaming in the organisation such as: a gender action plan and strategy, a gender structure (e.g. gender focal point, gender working group), an engendered monitoring and evaluation system, engendered reporting, gender training, key performance indicators for staff on gender mainstreaming, an engendered communication strategy, etc.

COMPREHENSIVE INSTITUTIONAL GENDER ASSESSMENT

AIM: To introduce participants with the Comprehensive Institutional Gender Assessment and to brief them about strategies to overcome resistance for gender mainstreaming within the organisation.

TIME: 30 min

MATERIALS NEEDED: Flip charts, markers, Comprehensive Institutional Gender Assessment Template (Annex 3.2), Power Points PP3.12 – PP3.13

STEP BY STEP GUIDE:

- Step 1 Ask participants if there are other areas that can be relevant for gender mainstreaming that are not reflected in the assessment checklist?
- Step 2 Note down the responses on the flip chart.
- Step 3 Give the participants a copy of Comprehensive Institutional Gender Assessment Template (Annex 3.2). Explain them more about the matrix.
- Step 4 Ask them to go quickly through it and see if there are any other elements, which were not included in the Institutional Gender Assessment Checklist.
- Step 5 Share with them some practical tips how to perform Comprehensive Gender Institutional Assessment template, using PP3.12- PP3.13 **PP3.12**
PP3.13
- Step 6 If time permits, arrange participants into the groups asking them to prepare a sample of the self-assessment questionnaire, they can use in the organisational assessment.
- Step 7 Ask them, if they think they will encounter any resistance preforming assessment in their organisation?
- Step 8 Follow up on this discussion, with the tips, how to overcome organisational resistance towards gender assessment and gender mainstreaming, using the PP3.15. **PP3.14**

FACILITATOR'S TIP

The Institutional Gender Assessment Checklist is the most basic way of institutional assessment. Ideally, organisation should carry out the full organisational assessment. If this is not possible due to a lack of support, resources or other conditions, this type of assessment, using the checklist will at least help to identify some possible immediate actions and provide an initial look at alliances to build better conditions.

FACILITATOR'S NOTE

TYPE AND SCOPE OF ASSESSMENT: depending on available human resources, the size of the organisation, the needs, management priorities, organisational complexity.

GENDER CHECKLIST	COMPLETE ASSESSMENT
General map of the current situation	Comprehensive analysis and overview
Focusing on most strategic elements	Covers all areas and levels that constitute the organisation; internal & external aspects
Low on resources and time demanded	Time and resource demanding
Outcome: a basic action plan	Outcome: at least Gender strategy
Performed by one person, or in a workshop environment , or hired professional	Participatory, engages entire organisation, can be led by hired professional

FACILITATOR'S NOTE

RESISTANCE TO GENDER ASSESSMENT

Similarly to other types of assessment engaging into the gender organisational assessment can be a threatening or at least uncomfortable for the staff or other stakeholders, as it might uncover conflicts within the organisation, open up unresolved issues, etc. Furthermore, many people (women as well as men) find the concept of gender threatening, or may feel threatened if the status quo is asked to make changes involving values, identities or power relationships.

Strategies for addressing resistance:

STAGE 1: Identify and map interests, positions, empathies, relationships, etc.

What are the position, sensitivity, level of resistance towards gender in organisation?

Who can be your potential ally? Who will be most challenging to deal with?

STAGE 2: Prioritize strategic points of entry, according to goals.

What and who is the best entry point to approach? What are the opportunities you might explore?

Which level or section might be strategic to enter first (programming, human resource policy, internal training policy, people's mental models, etc.)

STAGE 3: Seek support, in-house and outside.

Can you find a person to team up with (e.g. intern, consultant, or start a group of allies within the organisation, partner organisation equipped in that, etc.)?

STAGE 4: Develop your negotiating and advocacy capacity

Adopt attitude of proactive advocacy – attend meetings, discuss issue with clear, concrete proposals in hand

Define maximum and minimum levels for negotiation – outline, what is the least and the most acceptable level of negotiation for you.

Inspired by UNDP, 2004

PREPARING AN ACTION PLAN

AIM: To prepare a draft action plan, based on the assessment, and to learn key starting points to mainstream gender into the organisation.

TIME: 45 min

MATERIALS NEEDED: flip charts, markers, Copies of Action Plan Form (Annex 3.3), Power Points PP3.14 -3.16

STEP BY STEP GUIDE

- Step 1 Arrange participants in 4 groups, assign to each group one aspect of institutional gender assessment (e.g. political, organisational, etc.)
- Step 2 Ask them, based on their assessment score, to identify key steps they can take in order to improve the results. **PP3.15**
- ♦ What is in the assessment? What were the main findings of the assessment?
 - ♦ What lines of action can be established?
 - ♦ What activities might be carried out?
- Step 3 Ask them to report back in 20 minutes.

ACTION PLAN FORM

- Step 4 Distribute participants Action Plan Form (Annex 3.3), explaining them that this can be a useful tool for setting the next steps in advancing gender integration in the organisation.
- Step 5 Explain Action Plan Form to them, informing them that the form encompasses steps that organisation can take based on their score result. If their score is below 2, for example, they should look at the steps next to this score. **PP3.16**
- Therefore, not all actions will be relevant for all organisations. For instance, if they scored highly in a particular aspect of gender mainstreaming, it is likely that they have already completed some of the suggested actions.
- Step 6 Ask them to complete all of the four action plans (one for each aspect of gender capacity and readiness). Tell them the instructions as follows: "Take each aspect of gender mainstreaming that you have prioritised to work on, one at a time, and tick the actions you think are required for your organisation in its 'journey' towards greater gender integration. To begin with, look at the actions that relate to the scores your organisation achieved in the checklist. The grouping of the actions is not prescriptive; if there are actions that your organisation is ready for in other parts of the grid, then tick those too."
- Step 7 Share with the participants an example: If you got a score of 3 in Aspect 4: Political Will, look at all of the actions in the score section 2-3 of the Aspect 4: Political Will Action Plan. It may also be useful to review the actions in scores less than 2 to make sure your organisation has covered these actions. Be sure to fill in all the columns, including 'When the activity will take place, 'Who will have responsibility for it, and the 'Resources' needed for it to happen (e.g. staffing and materials).
- Step 8 Follow up with participants on importance of Action Plans or Gender strategy in the organisation. **PP3.17**

FACILITATOR'S TIP

- ♦ After the assessment shows us where we are, it is necessary to decide on the steps forward. Preparing an Action Plan or ideally a Gender Strategy enables organisation to decide where it wants to go, what are the goals and the main steps towards greater gender integration.
- ♦ Ideally, the plans should be completed with a few colleagues or in a workshop environment and need to be reviewed by the end of the current 12 month period.
- ♦ There is no need to do everything at once or even in the next 12 months. It's more important to make sure that timelines, responsibilities and resources are realistic so that the actions marked can be achieved

Section is inspired by Australian Red Cross.

Annex 3.1: INSTITUTIONAL GENDER ASSESSMENT CHECK LISTS

Adapted from InterAction's Commission on the Advancement of Women and adopted by the Australian Red Cross

ASPECT 1: TECHNICAL CAPACITY	1 Very small degree	2 Small degree	3 Moderate degree	4 Good degree	5 Great degree	TOTAL SCORE
There is a person and/or division responsible for gender in my organisation						Divide by 6
Staff have been trained to have the necessary knowledge and skills to carry out their work with gender awareness						
Program/project planning, implementation, valuation and advisory teams in my institution consists of members who are gender sensitive.						
Program/project planning, implementation, valuation and advisory teams in my institution include at least one person with specific expertise and skills in gender issues						
Gender analysis is built into our program planning and implementation procedures						
Gender analysis is built into our program evaluation procedures						
SUBTOTALS						
Total score						
ASPECT 2: ORGANISATIONAL CULTURE	1 Very small degree	2 Small degree	3 Moderate degree	4 Good degree	5 Great degree	TOTAL SCORE
Gender issues are taken seriously and discussed openly by men and women in my organisation						Divide by 5
My institution has a reputation for integrity and competences in gender issues among leaders in the field of gender and development						
The working environment in my institution has improved for women over the past two years						
Staff in my institution are committed to the advancement of gender equality						
My institution has made significant progress in mainstreaming gender into our operations and programmes						
SUBTOTALS						
Total score						

ASPECT 3: ACCOUNTABILITY	1 Very small degree	2 Small degree	3 Moderate degree	4 Good degree	5 Great degree	TOTAL SCORE
Data collected for programmes and projects are disaggregated by sex						Divide by 4
The gender impact of projects and programmes is monitored and evaluated						
My institution's programmes and projects ensure equal participation of, and benefit to, men, women, boys and girls.						
Gender awareness is included in job descriptions and/or job performance criteria						
SUBTOTALS						
Total score						

ASPECT 4: POLITICAL WILL	1 Very small degree	2 Small degree	3 Moderate degree	4 Good degree	5 Great degree	TOTAL SCORE
The integration of gender equality in programmes/projects is mandated						Divide by 5
There is a written policy that affirms commitment to gender equality						
Senior management actively supports and takes support for our policy on gender equality (or promoting gender equality if no policy exists)						
There has been increase in the representation of women in senior management positions in the past few years						
My organisation has budgeted adequate financial resources to support our gender integration work.						
SUBTOTALS						
Total score						

UNDERSTANDING THE SCORES

<2	Your institution has some work to do to improve this aspect of gender capacity and mainstreaming
2-3	Your institution is moving in the right direction in this aspect of gender capacity and mainstreaming, but their remains work to be done
4	Your Institution has achieved a lot in this aspect of gender capacity and mainstreaming, but embedding and sustaining your efforts remain the biggest challenge
5	Your institution demonstrated a genuine commitment to gender capacity and mainstreaming in this aspect. Congratulations!

Annex 3.2: OVERVIEW OF FULL INSTITUTIONAL GENDER ASSESSMENT

Areas to review	What to review	Methods/tools	Assessment questions
Policy and programme frameworks	<p>Gender policy and vision (and knowledge about it)</p> <p>Logframes and other frameworks – gender in objectives, outputs, activities, budget; other strategic and planning documents</p> <p>Policy on communication and images</p> <p>Manuals and publications reflect gender</p>	<p>Organisational, programme/project document review</p> <p>Management and staff interviews</p> <p>Self-assessment questionnaire</p> <p>Staff workshop/focus group</p> <p>Internal and external communication materials and tools</p>	<p>Is there a gender policy or strategy of the organisation?</p> <p>Does the staff and management know and are familiar with the gender policy? Are those documents widely disseminated and available/obtainable?</p> <p>Has gender been incorporated in the key planning documents, such as logframes, programme strategies, annual management plans?</p> <p>Are disaggregated data used in all areas of work, including selection of staff and organisational matters as well as planning and reporting?</p>
Existing gender capacity /Technical capacity	<p>Gender focal point on staff</p> <p>Staff's level of capacity and knowledge on gender</p> <p>Finances allocated for gender, including for the gender focal points</p> <p>Partners/advisory group with gender expertise</p> <p>Gender training/capacity of staff and stakeholders</p> <p>Resource materials on gender available to staff</p>	<p>Management and staff interviews</p> <p>Interviews with partner organizations</p> <p>Self-assessment questionnaire</p> <p>Staff workshop/focus group</p>	<p>Is responsibility for gender shared among the staff or is only responsibility of an assigned person (gender focal point for example)? How much training and experiences does she/he have? Are specialists hired to help her/him in specific tasks? Does she/he work alone or in a team?</p> <p>What is the level of knowledge on gender by the staff (e.g. in technical terms – no. of trainings they have attended, including their degree, sensitivity, resistance to gender)?</p> <p>Are there any past or planned gender trainings? Do existing trainings include sections on gender? Is there any institutional learning activity on gender? How many people attended/attends them, disaggregated by sex?</p> <p>Are there positive conditions for the staff to take part in the training (e.g. management grants time and space for attending the training)?</p> <p>Are there available manuals, publications on gender? Are they publicly available? Are there working tools available or developed by the institution for the use of the staff?</p>
Budgetary issues	Budgets/ budget procedures	Analysis of the documents	<p>Are there any funds allocated specifically for gender-related work? Any for projects on women's rights or women's empowerment?</p> <p>Are gender equality objectives reflected in both regular budget allocations and extra-budgetary allocations? Are efforts made that ensure all projects and programmes implemented by the institutions include a gender mainstreaming strategy?</p>

Areas to review	What to review	Methods/tools	Assessment questions
Gender-conscious workplace (organisational culture)	Work/life policies	Staff interviews	Are the staff members rewarded for or discouraged from engaging in gender equality issues?
	Sexual harassment & discrimination policies	Self-assessment questionnaire	Is the institution seriously involved in promoting empowerment of women and men and changing cultural norms in society? Who exerts most influence in the work unit when it comes to whether or not gender issues are taken seriously or neglected?
	Gender-sensitive work environment	Staff workshop/focus group	Are human resource policies on paternity, benefits, etc. applied? What mechanisms are used, whether the whole staff benefits or only those who have certain kind of contract?
	Processes of orienting new staff	Participant observations	Observe, whether job flexibility policies, such as work and life or training/study plans, are applied, whether the main users of these policies are men or women, and for what purpose these policies are used? Are flexible and part-time arrangements possible for all staff members, regardless of category and function?
	Gender sensitivity and relations among staff (men and women)		<p>Are there spousal or dependent benefits (such as pension or health insurance) that may place one gender at an advantage over the other?</p> <p>Are there any sexual harassment and discrimination policies in place? Is there a responsible person for these policies? Are they and other personnel familiar with these policies?</p> <p>What is the level of transparency in the organisation? How are decisions taken, who is included, what is the sex balance? Who makes decisions on budgets?</p> <p>Are financial/budget matters discussed openly in the organisation? Are principles of transparency and accountability (overall and budgetary) followed/encouraged within organisation? Is this depicted in works/actions or both?</p> <p>What is the level of staff sensitivity and commitment to gender? Are relations among the staff of different sexes cordial and respectful? Does staff feel, regardless of their sex, they receive equal treatment? Are relations among fellow workers established on the basis of sex, age, political ideology, religion or other characteristics?</p> <p>Are there sexist expressions, comments or rude jokes that could affect other staff because of their sex, race, place or origin or age?</p> <p>Are there any signs of use of physical space and gender-differential behaviour in the institutions internal activities, both formal or informal (e.g. selection of moderators at official ceremonies, chairs of meetings; monopolisation of conversations and discussions by men or women, any differential treatment of the people at the power (e.g. boss) towards employees based on their gender, office space allocation, more pressure on women to demonstrate the ability, occupational segregation, etc.)?</p>

Areas to review	What to review	Methods/tools	Assessment questions
Human resource level	<p>Gender balance at management level</p> <p>Gender balance at professional level</p> <p>Gender balance at field level</p> <p>Human resource policies</p> <p>Recruitment policies reflect gender considerations</p> <p>Promotion of gender balance, payments according to gender</p>	<p>Management interviews</p> <p>Staff workshop/focus group</p>	<p>What is the sex balance of staff at all levels of institution? How is the sex balance of staff promoted and maintained; if at all: by positive action, additional facilities, targets, trainings?</p> <p>How are women and men distributed among staff positions? Is sex parity an objective? What is the sex distribution in decision-making versus support functions? Has this been increased in the last years?</p> <p>Are recruitment and selection procedures transparent and gender sensitive for all types of jobs, including technical cooperation?</p> <p>Are the gender criteria incorporated into the processes of recruiting new staff or consultants? Do terms of references for not specifically gender related work include gender knowledge and experience, especially for staff being hired for projects and programmes? Are candidates questioned about their marital or family status, or intimate personal matters?</p> <p>What is the staff salary distribution in the institution (sex-disaggregated according to the level)? How long have the staff members (men/women) been in the some grade?</p> <p>How much the office allocates for each sex financially? Are the payments for equal position and responsibilities between the men and women the same?</p> <p>What are the promotional policies? How more women or men have been promoted in the recent years? Are there any signs in gender discrimination in this field?</p> <p>How does the organization, unit or department demonstrate its commitment to gender equality in its hiring practices?</p> <p>Do selection criteria for consultants include knowledge or experience in addressing gender inequality in programmes and policies?</p> <p>Are there any gender briefing kits available for new employed staff or short term consultants?</p>

Areas to review	What to review	Methods/tools	Assessment questions
Communication and images	Communication policy Organisational documents, website, etc.	Organisational documents review.	<p>Is there any policy on communication and images? Does it contain any reference to gender?</p> <p>Do research, advocacy and publicity materials used by the organisation include information from a gender equality perspective (e.g. language of the material, images used, addressing the people in letters and other correspondence, communications from managements, choice of women/men or both to facilitate events; website, speeches, etc.)?</p> <p>Does newsletter or information bulletin pay attention to experiences in project/programmes on gender issues?</p>
Accountability mechanism	Sex-disaggregated monitoring & evaluation system	Organisational, programme/project document review	<p>Does staff or organisation have ideas about the relative success and outcomes of their work on gender equality?</p> <p>Is gender addressed in the performance indicators? In monitoring and evaluation systems?</p> <p>Are there effective financial and administrative mechanisms in place allowing for the tracking of planned and spent resources and planned and completed activities on gender mainstreaming?</p>
Gender policy in external relations			<p>What has the institution done to inform partner organisations of gender policy developments?</p> <p>Has the institution supported partner organisations capacity development on gender equality, and on gender balance?</p> <p>What have partner organisations done to solicit the knowledge on gender equality and gender mainstreaming?</p> <p>Are gender criteria applied in choosing the partner organisations? Selecting organisations to perform services for you? To access your funds (if funds provider)?</p>

Inspired by: ILO, 2007; UNDP, 2004

Annex 3.3: INSTITUTIONAL GENDER ASSESSMENT – Action Plan

Date undertaken:

People involved:

Action plan for aspect 1: TECHNICAL CAPACITY Date (xx/yy/zz)		Required	When	Who is Responsible	Resources Needed	Foreseen challenges
Score of < 2	Identify qualified/experienced staff who can take responsibility for resourcing and monitoring gender capacity in program planning and implementation.					
	Identify the various gender analysis tools, information and resources currently available and used by program staff for planning.					
Scores of 2–3	Ensure that the Organisation gives responsibility to identified staff, which are qualified and experienced, to resource and monitor gender capacity building.					
	Ensure that program staffs understand the need for gender sensitive responses by providing opportunities to undertake gender training and have their competencies assessed.					
	Develop and circulate a set of (best-practice) gender analysis tools, information and resources so that program staff can gather sex disaggregated data and consult with men and women equally to assess needs.					
	Identify gender-sensitive indicators for program areas so that staff can integrate them into planning documents and monitoring/evaluation systems.					
Score of 4+	Ensure the availability of qualified/experienced staff to appraise project plans and ensure that strategies respond to findings from gender-sensitive needs assessments.					
	Ensure that program staff develops risk management plans that identify how constraints to gender mainstreaming will be dealt with.					
	Ensure that program staff develops terms of reference for review/technical specialists that outline specific criteria and responsibilities for assessing the strength of gender mainstreaming approach.					
	Ensure that program staff integrates gender-sensitive indicators into planning documents and monitoring/evaluation systems, and prepare project reviews and reports that include information and analysis against these indicators.					
	Ensure that data and lessons learned about gender are part of the organisation's data base.					
	Ensure that data and lessons learned about gender and development are periodically disseminated so that the organisation contributes to the evidence base.					

Date of review:

Person Responsible:

Action plan for aspect 2: ORGANISATIONAL CULTURE ... 1/2 Date (xx/yy/zz)		Required	When	Who is Responsible	Resources Needed	Foreseen challenges
Score of < 2	Draft an organisational strategy to mainstream gender into all aspects of the Organisation's operations and programs.					
	Ensure that specific and measurable indicators are developed for the gender strategy and that responsibilities and timelines are clearly articulated.					
	Ensure that data and lessons learned about gender are available to all parts of the organisation through a centralised database.					
	Develop gender responsibilities and competencies for key program and project managers and staff positions.					
	Develop organisational policies that recognise and make reasonable provision for family responsibilities and the needs of women staff in the field.					
	Ensure the recruitment of experienced gender expertise to develop staff gender capacity in all planning, monitoring and review activities (programs and operations).					
Scores of 2-3	Ensure that senior staff approve the organisational strategy to mainstream gender into all aspects of the organisation's operations and programs, and commit to assessing the performance of the organisation against gender equity, programming initiatives, etc.					
	Ensure that the recruitment process for senior positions in the organisation coaches and encourages women to apply and addresses constraints to their participation.					
	Ensure that training opportunities for staff are equally available to men and women; and that participation rates of women and men are monitored and used for human resources planning and budgeting.					
	Ensure that the recruitment process for staff considers gender.					
	Ensure staff conditions make reasonable provision for family responsibilities and the needs of women staff in the field.					
	Ensure that staff remuneration packages make reasonable provision for maternity leave.					
Score of 4+	Ensure that senior staff, program staff, communications staff and others in the organisation are using the centralised database to extract data and lessons learned about gender.					
	Ensure that the gender strategy is reviewed annually with information from monitoring and assessment against indicators used in developing future iterations.					
	Ensure that the organisation monitors, analyses and reports on the balance of men and women staff and volunteers, their position status, and the promotion of women.					
	Ensure that gender capacity is assessed as part of staff performance appraisals and linked to human resource plans; and that developing gender capacity of staff and volunteers is an integral part of human resource development and human resource management strategies (including their access to data, information and tools to build gender capacity).					

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Action plan for aspect 2: ORGANISATIONAL CULTURE ... 2/2 Date (xx/yy/zz)		Required	When	Who is Responsible	Resources Needed	Foreseen challenges
Score of 4+	Ensure that the gender strategy and the organisation's progress with gender equality in operations and programmes are communicated to all stakeholders through communications and promotional mechanisms including the annual report.					
	Ensure that the organisation maintains linkages with external agencies that have gender expertise and is represented on external gender forums.					
	Ensure that the Board maintains its balance of men and women members or is working towards achieving equal representation.					

Date of review:

Person Responsible:

Action plan for aspect 3: ACCOUNTABILITY Date (xx/yy/zz)		Required	When	Who is Responsible	Resources Needed	Foreseen challenges
Score of < 2	Determine whether program staff really understand the gender differences which often affect men and women's participation in meetings, consultations, field visits and training activities – in particular the gender-specific barriers to participation experienced by women.					
	Ensure that program staffs understand the importance of gender mainstreaming in their work by providing opportunities to undertake gender training and have their competencies assessed.					
	Ensure a basic analysis on the status of women and men is conducted in your organisation/municipality/community.					
Scores of 2-3	Ensure that data collected on men and women inform program/project/proposal design and delivery.					
	Ensure that program staff develop training curricula, materials and targets that respond/are sensitive to gender analysis findings, pilot studies and results from consultations with men and women.					
	Ensure that program staff develop media/communications strategies and schedules that maximise opportunities for women to hear about, participate in, and benefit from project activities, and that the effectiveness of these strategies are assessed in consultation with women (in recognition that women and girls have preferred ways of receiving information and are influenced by it differently to men).					
Score of 4+	Ensure all project management committees are gender balanced.					
	Ensure that program staff provide opportunities for additional training/mentoring support to women to increase their participation in project management committees (and/or other project activities).					
	Ensure final program reports provide information and analysis of their effectiveness against agreed gender indicators.					

Date of review:

Person Responsible:

Action plan for aspect 4: POLITICAL WILL ... 1/2 Date (xx/yy/zz)		Required	When	Who is Responsible	Resources Needed	Foreseen challenges
Score of < 2	Develop an anti-discrimination against women clause for inclusion in the Organisation's internal policies.					
	Develop a position on sexual harassment and violence against women or include this section in existing policies or Codes of Conduct.					
	Complete an audit of key organisational documents such as the mission statement, strategic plan and other internal policies to determine whether they uphold principles of gender equality.					
	Develop organisational procedures for dealing with complaints related to gender-based discrimination, violence and sexual harassment.					
	Obtain examples of policies from other organisations that reflect a commitment to gender equality and are in line with international conventions on the rights of women and girls.					
Scores of 2-3	Ensure that an anti-discrimination against women clause is included in the internal policies.					
	Ensure that the internal policies or codes of conduct take a stand against sexual harassment and violence against women.					
	Ensure that principles of gender equality are upheld in key documents such as internal policies, mission statement and strategic plan.					
	Ensure there is a policy to support the procedures for dealing with complaints related to gender-based discrimination, sexual harassment, and violence against women.					
	In consultation with key stakeholders (e.g. staff from all levels of the organisation, organisation partners) and using examples from other organisations, develop a policy that reflects organisational commitments to gender equality and is in line with national legislation and international conventions.					
	Ensure that board members, senior staff, and staff members understand the rationale for having gender equality principles, an anti-discrimination against women clause, and a position on sexual harassment and violence against women.					
Score of 4+	Ensure that the Board adopts a policy that reflects organisational commitments to gender equality and is in line with national legislation and international conventions.					
	Ensure that the Board and staff understand and comply with the gender-based discrimination, violence and sexual harassment policy.					
	Ensure that the gender policy is distributed widely throughout the organisation and included in relevant policies and procedures manuals (including recruitment and induction).					
	Ensure that board members, senior staff, and staff members understand the gender policy and apply it to their systems and processes; and that the overall performance of the organisation is assessed against the gender policy.					
	Ensure that the Board approves the gender policy and makes a commitment to its review.					

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Action plan for aspect 4: POLITICAL WILL ... 2/2 Date (xx/yy/zz)		Required	When	Who is Responsible	Resources Needed	Foreseen challenges
Score of 4+	Increase recognition of the importance of annual operational budget allocations for building and monitoring the organisation's gender capacity					
	Ensure the organisation's gender policy is revised and up-to-date so it continues to reflect organisational commitment to gender equality and remains aligned with national legislation and international conventions					
	Ensure that organisation's gender policy is used for management and program planning and as part of periodic review of the organisation's performance					
	Ensure annual operational budget allocations to building and monitoring the organisation's capacity for gender					
	Ensure that the organisation takes advantage of grant opportunities to build capacity for gender sensitivity					

Date of review:

Person Responsible: