Are you working to improve things for women and men in your community? Or carrying out a participatory appraisal of an area’s needs and requirements? Or undertaking a community-based consultation?

Then this is the guide that you need. Based on an actual gendered participatory appraisal in Wales, it offers a thorough explanation of why looking at men and women’s different life experiences is an essential part of any participatory work.

It takes you through the stages of a process which is gendered throughout – in other words, which takes account of the different perspectives of women and men. It gives you a range of clearly explained tools. And it explains how to analyse and collate qualitative information with a gender perspective.

Participation is an ongoing process – get it right from the start and it can help shift power from the powerful to the powerless. This guide shows how to carry the process through from exercises to action: action that can lead to real and lasting changes in the lives of men and women.
Acknowledgements

This guide was written by Helen Buhaenko, Vikki Butler, Charlotte Flower, and Sue Smith of Oxfam GB. It was edited by Nikki van der Gaag, produced by Jo Lyon, and designed by Maria Delves. The cartoons are by Les Evans.

Thanks in particular to the Gellideg Foundation Group and Cae Mawr (Friends of Jason) Group, who helped to develop and pilot the tools included in this guide. Many of these are adapted with permission from Participatory Learning and Action: A Trainer’s Guide (J.N. Pretty, I. Guijt, J. Thompson, I Scoones; IIED 1995).

Copies of this guide can be ordered from www.oxfam.org.uk/publications or from Oxfam GB at:
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The guide is also available in Welsh: for more information please contact Oxfam Cymru as above.
1. INTRODUCTION

Participatory work with communities can only be effective if it takes gender into account. This guide explains why, and offers a range of practical tools to explore community issues through the different experiences of men and women, boys and girls. It gives guidance on good practice on gender and participation, and outlines the stages of managing a gendered participatory appraisal. It also explains how to analyse and collate qualitative information with a gender perspective.

It will be of use to anyone who wants to build awareness of gender, carry out a community consultation, or plan a course of action using participatory tools to bring out the different responses of men and women. This toolkit describes how gendered participatory work has the potential to bring about lasting change. Participation is an ongoing process – get it right from the start and it can help shift power from the powerful to the powerless.

GENDER, SEX AND EQUAL OPPORTUNITIES

**Sex** is determined by whether we are born female or male; gender roles are the expected social roles attached to being women or men. Taking a gender perspective means looking separately at the different needs of men and boys and women and girls.

**Gender analysis** examines the roles and responsibilities of women and men and explores the relationships between them, known as gender relations. Having done a gender analysis, and discovered where there are differences, barriers and inequalities, positive action describes things that can be done to redress them.

**Equal opportunities** is a term that people are sometimes more familiar with than gender. It is used not just for women and men, but also for other ways of being disadvantaged such as race, age, disability. In terms of gender, equal opportunities provide concrete ways to take action on the inequality revealed by a gender analysis.

**Gender** is used in this guide to show how to bring out the differences between the experiences of women and men. For example, collecting information separately from women and men; using single-sex groups in applying the tools; and analysing the results of a discussion or survey to see the differences and similarities between men and women.

Why is gender important in participatory work?

The expected roles we take on as individuals vary according to the period of history in which we live, the society we live in, our economic status, our ethnic identity, religious belief, age and our sexual preference. All these contribute to men’s and women’s expectations and beliefs about how the sexes should behave and what they ‘usually’ do.
In participatory work, looking at the concerns of men and women separately makes it possible to deal appropriately with each sex’s experiences – and have a better chance of meeting their different needs. For example, if you have a good understanding of why men and boys find themselves in the position they are in in your area, why they make the choices they do and why they take the actions they take, you will be better able to make recommendations for change targeted at the source of a problem rather than the symptom.

Looking at gender is about questioning assumptions and looking beyond stereotypes about what is appropriate for men and women. It is more than just taking account of men and women’s views.

Gender analysis interprets stereotypes about, for example, unemployed people, men and women, lone parents and teenage mothers. It is important for individuals in giving women and men the space to think about their lives. How does being a man or a woman affect the choices they make or can’t make and how they want to live their lives? It is important for organisations because future plans and present services have to take into account men and women’s different needs and situations, or they will not be able to meet them in a way that gives both equal opportunities.

Who holds the power to do what within communities is not just influenced by gender, but also age, disability, race and language. The tools and processes here can be adapted to analyse power relationships in relation to these other diversities.

How the Guide began

This guide is based upon a gendered participatory needs assessment that Oxfam undertook with the Gellideg Foundation Group in South Wales1. It takes the reader through the stages that the team took to carry out the assessment.

To show how the tools can be used in different settings, they were also piloted in three additional contexts:

- With practitioners at a conference workshop exploring gender in development.

- With a small community group in Cae Mawr, Llandudno, who wanted to use a gender perspective for their action plan and to timetable their activities.

- With project workers and researchers from a national voluntary organisation in a training day in Port Talbot.

The work in Gellideg and the three pilots are referenced in text boxes and provide examples of using the tools in practice. Although they were undertaken in Wales, the tools and PA techniques are applicable to other areas.

1 See ‘Fifty Voices are better than one: Combating social exclusion and gender stereotyping in Gellideg’, Oxfam 2003
2. WHAT IS A GENDERED PARTICIPATORY APPRAISAL?

‘The (gendered participatory appraisal) exercise enlightened us all to the needs of the people on the estate. It was a real eye opener... it gave me an insight into the estate that I hadn’t had before.’

Mark, youth worker, Gellideg estate

Participatory Appraisal (PA) is a planning, research, analysis and action process that uses certain methods to involve all sections of the community in consultation and the action that results. Originally developed with communities overseas, it is also sometimes known as PLA (Participatory Learning and Action) or, originally, PRA (Participatory Rural Appraisal).

For the participatory process to be gendered it must take into account the different needs and experiences of men and women, boys and girls, young and old people, throughout the process, from the planning stage, through analysis, to implementing solutions.

For a process to be participatory it requires meaningful involvement of a wide variety of community members. They also need to be involved in the implementation, monitoring and appraisal of plans after the assessment. A ‘participatory appraisal’ can also be known as a community needs assessment, community audit, community survey and participatory action research.

Using different terminology can be confusing, but the most important thing to bear in mind is the principles upon which the work is based.

Why do participatory work?

The term ‘participation’ has different meanings for different people, ranging from passive (where people are told what is to happen) through consultation (where people’s opinions are sought but may or may not be acted upon) to self-mobilisation (where people take initiatives either with or without external institutions). Often though, the word is used unqualified. What someone with power considers to be participation (‘We asked the public what they thought’) and what those without power consider to be participation (‘They asked us but did not listen’) are often very different. Real participation means changing decision-making processes to ensure that those who are most affected by decisions are able to influence them.
Participatory work means involving local people in decisions about their lives. This is important for the success of any project because:

- Only local people know the issues they experience, the barriers they face and the opportunities available in the area where they live.

- Men and women, girls and boys have different experiences and any action plan needs to be based on their knowledge of these differences.

- Community members are experts in their own lives and have good ideas as to how to solve the barriers that they and the community face. They also know how to build on the strengths of their area.

- Sharing funding priorities and finances with a community readdresses power balances. Communities have a right to be involved in how public money is spent.

- If the process has a long timescale, using and increasing local skills will add to any funded project’s sustainability.

If participatory work is undertaken badly it will be much harder for the next piece of participatory work to engage the same people. People who have the experience of not being listened to are less likely to want to be involved a second time around.

**Participation as process**

Participation is a process. It is a powerful means to bring about change in a community, by the shifting of power to the people closest to the issues – those living in an area and/or a community group which represents them. For local men and women to
become empowered, they need to be in control of this process. This is where a participatory process differs so considerably from a standard survey process; it is not about asking large numbers of people the same questions, it is about engaging as many people as possible in a process of learning, analysis and thinking through solutions. A good process will be inclusive and move through information gathering, analysis, prioritisation and action planning, to decision-making. It is therefore important to be reflecting on and challenging how inclusive the process is at all these stages and how it promotes an equal voice for all community members, whether powerful or not.

**Effective participation is gendered participation**

For participation to be effective, there needs to be an understanding of how a community is made up. No community is homogeneous – not everyone has the same needs, thoughts, or experiences. Different people will have different access to power as well. All this needs to be understood. Gender is one area where there are fundamental differences. Age, disability and race are some of the others. These all affect each other and influence decision-making in two fundamental ways:

**Process** – the way things are carried out. Different people will be able to engage in decision-making processes in different ways – not everyone can stand up at a meeting and talk, not everyone will be happy to fill in a survey questionnaire, not everyone will go to a public meeting. Developing an inclusive and participatory decision-making process requires a range of different approaches to suit different needs.

**Content** – the issues that need to be addressed. Within a community, people will have a range of different problems and needs and different opinions about what those problems are. Decision-making processes need to take these into account so that programmes and projects can be designed effectively.

Good participatory work should lead to action plans that promote equality between different parts of the community, including between women and men. It should leave a community stronger and should result in tangible changes for the better.
When to use a gendered PA?

All PAs need to be gendered if they are to be successful. A gendered PA can be used in very different circumstances; for consultation, research or even to draw up funding proposals. It is useful if you want to get to the deeper causes of problems in an area and involve men and women in changing things.

The tools can also be used in different contexts to explore issues, pose questions or specifically for community development work.
3. THE DIFFERENT STAGES

A gendered participatory appraisal has nine stages, shown in the table below. These need to be taken in order, though some will take much longer than others. Stages 1 – 4 are preparation and consultation, Stage 5 and 6 are the bulk of the work – interviewing and analysis, Stage 7 is checking these stages, Stage 8 is planning the action resulting from the appraisal, and Stage 9 is evaluation of and reflection on the whole process.

Following the table is an explanation, with case study examples, of each stage.

Each of the tools in Section 4 of this report can be used for different stages, and there is a table at the top of each tool to show which is most appropriate for which stage.

The stages of a gendered participatory process

<table>
<thead>
<tr>
<th>Stage in process</th>
<th>Questions to keep asking throughout</th>
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<tbody>
<tr>
<td>Stage 1: Defining the aims and understanding the issues</td>
<td>Why are we doing this? Who has the power to define the aims? Are there any gender dimensions to these aims? What are they and who is defining them? Who has been involved in defining them, and who hasn’t? Does everyone in the implementing team understand what gender is and what participation means? Check for gender bias within the team – do you have an equal number of men and women?</td>
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<tr>
<td>Stage 2: Raising awareness</td>
<td>Which decision-makers? Who should be involved? Community members/local authority officials/voluntary sector representatives? How to ensure that community organisations are central to the process? How aware are the different stakeholders of the need for a gendered approach?</td>
</tr>
<tr>
<td>Stage 3: Planning what you want to do and training to do it</td>
<td>Do activists need training in PA or in gender issues? Have you set realistic targets? Balanced short, medium and long term aims? How will you reach marginalised women and men, young and old, equally?</td>
</tr>
<tr>
<td>Stage 4: Creating a timeline</td>
<td>Allow days for reflection and review. Allow time for thinking about gender issues – both in terms of who is involved and the issues raised. Allow time for analysis.</td>
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<tr>
<td>Stage 5</td>
<td>Finding out through group work and/or individual interviews</td>
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<td></td>
<td>Engaging with men and women. Including all sections of the community. Ensure there is a review period to check which groups and people aren’t involved in the process. Are the right issues being covered? Are gender issues being raised? Who isn’t speaking and why? Create space for, and encourage discussion of, issues which draw different responses from men and women.</td>
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<tr>
<th>Stage 6</th>
<th>Analysis of all information collected</th>
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<td></td>
<td>Analyse findings according to gender, age and other diversities if necessary. Are men and women equally involved in this?</td>
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<tr>
<th>Stage 7</th>
<th>Verification and Action Planning – checking your conclusions with the wider community – and action planning</th>
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<td></td>
<td>Are there tensions between different needs and issues? Will these be managed through the way the verification process is planned? Prioritise between suggested ways forward. Are men and women, old and young, involved in this process? Challenge assumptions about prioritisation – who might be influencing this, why?</td>
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<tr>
<th>Stage 8</th>
<th>Reporting and moving forward</th>
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<td></td>
<td>Who is involved in planning? Men and women equally? Ensure the appraisal process is not a one-off.</td>
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<th>Stage 9</th>
<th>Reflection and evaluation</th>
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<td></td>
<td>Evaluate the implementing team’s overall assessment of the experience and the impact of the work. Were the objectives met? How gendered and how participatory was the whole process? What are the lessons to learn for next time?</td>
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</tbody>
</table>
3.1 Stage 1: Defining the aims

At the beginning, think through what you want to achieve from the participatory appraisal. As a minimum, it could be expected that by the end of the process the community will have a better understanding of itself and its issues, and that community participation and engagement in decision-making in the area is strengthened. In order to achieve this, you will need to decide the key questions that you need to ask and the key information that you need to gather. When thinking this through, ensure that gender issues are raised.

For example:

- Why is it difficult for women to enter the labour market or get better skills? Why is it difficult for men? What's the difference?

- Why is it difficult for men to see themselves as responsible for child care or elder care? Why is it easy for women? What's the difference?

- What are the crime issues for men, women, youth and children in the area? How are these issues different for the different groups?

- Who is affected by the built environment? In what way? How are men and women affected differently?

- What are women's health issues? What are men's? Children's? (and who is responsible for these?)

You will also need to do background research first – in Gellideg this meant going through the Objective 1* criteria on equality of opportunity (gender). The team will need to check that the aims of the process are clearly communicated to the community – this is the opportunity to change and refine them as necessary.

Who does what?

One of the first things that needs to be done is to establish the boundaries of the gendered appraisal, whether geographical or communities of interest. An understanding of the numbers of people affected by the gendered PA makes it easier to assess the time the appraisal will take, and the numbers of people who need to be involved in delivering it. In Gellideg, on a geographically compact estate of 500 households, two people were employed part-time for the whole period of the assessment. Back up support was provided by trainers and the Gellideg Foundation Group Coordinator. It is important to be transparent about who is doing what from the beginning because this will also clarify how decisions are made and where the power lies.

Ideally, it would be better to carry out a gendered PA in an area where a community group already exists. The desire to carry out the PA should be generated from the community group on behalf of the needs of the community. A good gendered PA has the potential to strengthen the capacity and membership of a community group.

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* Significant financial support is available in Wales from the European Union. Organisations are able to access all of Europe's major structural funding programmes to undertake a wide variety of innovative and ambitious projects to promote economic regeneration and revival. The funding is available via programmes known as Objective 1, Objective 2, and Objective 3 as well as the Community Initiatives. The largest of these is the Objective 1 programme, where between the years 2000 and 2006 a large part of North and West Wales plus the Valleys areas qualify for aid. The Gellideg Foundation Group applied for Objective 1 funding from Europe, basing its application on the findings that came out of the Participatory Gendered Needs Assessment. The application was successful and the Group were awarded over £500,000 to deliver gendered services to help men and women in Gellideg take the first steps back to training and employment opportunities. Source: Wales European Funding Office www.wefo.wales.gov.uk
If there is no existing group, then one of the priorities of the appraisal must be to empower local people to form such a group.

The implementing team

There are various roles when undertaking a gendered PA. These roles make up the implementing team. This will be different for different PAs, but is likely to include participatory assessors, manager(s), trainer(s) and a facilitator. Ideally as many of the members of the implementing team as possible are drawn from the community or community group.

The participatory assessors

You will need a gender balance here of at least one man and one woman who gather information from the community, using the tools in individual interviews or small group sessions. The selection of these assessors is absolutely vital for the success of the appraisal, and choices have to be made whether to choose local people or outsiders. As a rule it is more empowering for the community if skills and training can be kept as closely connected to the community as possible. If the assessors are local people then checks must be put in place to prevent personal assumptions and preferences from colouring the interviews. Some communities are too divided for local people to trust each other and there may be a case for outsiders to be used. The assessors in Gellideg were local employees of the Gellideg Foundation Group, the two youth workers.

If outside consultants are used as participatory assessors, there are important issues to consider. People may be suspicious of outsiders coming in to their area and may be reluctant to talk to them – or even deliberately mislead them. Often outsiders are given very neutral information about traffic calming and environmental improvements, but may find that people do not want to talk to them about issues around domestic violence, debt, welfare or literacy problems.

Whoever is carrying out the assessment, the community will need assurances that the information gathered is confidential.

The manager(s)

The manager is whoever is employing the participatory assessors. In Gellideg this was the Group Coordinator of the Gellideg Foundation Group. If staff from a local voluntary or statutory agency are tasked with carrying out the PA, there needs to be absolute clarity about how they are directed and how they report back to the community group.

Trainers in gender and participatory techniques

It is important that everyone is trained from the beginning in a gendered participatory approach. This training needs to involve participatory ways of working and an understanding of why a gendered perspective is important and how to carry it out. The implementing team can then facilitate the use of the tools.
The facilitator of the implementing team

The facilitator’s job is as a catalyst to oversee the process. They may or may not be involved in the actual gathering and analysis of information. The facilitator of the implementing team works in partnership with the wider community, community organisations and the implementing team to ensure that all parties work inclusively. They can also offer guidance at each of the different stages of the process.

Attitudes to, and respect for, all people involved in the process are as important as knowing appropriate methods. The facilitator should ensure that everyone who wants to be involved knows why the PA is happening, what will happen to the views they express, and what the possible outcomes might be. This transparency enables power to be shared between the facilitator, implementing team, community organisations and the wider community.

Sometimes outsiders are employed as facilitators of the process. As with the other roles, this approach has its advantages and disadvantages. The advantages are:

- An outsider brings in other experience and knowledge, which can be essential in solving problems.
- An outsider can be neutral.

The disadvantages are:

- It can lead to expertise being perceived as being outside the community.
- It shifts power relations to outsiders.

Take a step back and assess the make up of all the roles. On balance are a majority of the roles being performed by community members or by outsiders?

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**THE GELLIDEG GENDER NEEDS ASSESSMENT TEAM**

The team consisted of three people from Oxfam, and three from the Gellideg Foundation Group (GFG). This meant an equal balance of people with practical day-to-day experience of the community and how it ticked, and advisers with experience of the nature of disadvantage in the UK and of the kind of tools used to tackle poverty internationally.

They worked together at each stage of the gender needs assessment – carrying out the pre-training, designing the data-gathering process, pulling the data together, analysing the results, and evaluating how it had worked out.

The relationship of trust between ‘insiders’ and ‘outsiders’ relied on:

- Oxfam’s conviction that local knowledge had to design and shape the process, and adapting it to fit the reality of life for women and men in the community as communicated by the GFG workers.
- The GFG’s openness to new ideas and tools from elsewhere, and their belief that a gendered needs assessment would mean a more participatory process and a high quality bid for Objective 1 funding.
3.2 Stage 2: Raising awareness

Some decision-makers and stakeholders may not be directly involved in the participatory appraisal. However, they need to understand what is going to happen and why because they can make a difference once the findings of the appraisal are available. Community organisations need to work with local authorities because they cannot change structural barriers like the job market, the benefits system, council and voluntary sector services. It takes national bodies to move the structural barriers and work towards the solutions community members have identified (see Tool 16 Personal, social, structural for more detail on these barriers).

Engaging decision-makers also means that a gendered PA can support dialogue between them and the community in the area concerned. It is important that decision-makers both understand what a PA is and what gender is about and why it is important; some awareness raising on this might be necessary.

ESTABLISHING GOALS IN GELLIDEG

Before gathering information from the wider community in Gellideg, local decision-makers and the community organisation attended a workshop. This identified what was to be achieved, how it fitted in to an Objective 1 application for funding to the European Union, and checked the intended outcome was not in conflict with the wider objectives of the community organisation. Participants included community organisation staff, the local councillor, members of the youth group, people from a locally active non-governmental organisation and the local voluntary sector umbrella organisation, and Oxfam staff. At this first workshop we explored why a participatory approach was needed and what a gendered analysis meant.
3.3 Stage 3: Planning what you want to do - and training to do it

The planning tools can be used for planning any course of action or timetable – they do not have to be used just when undertaking a gendered PA.

Some of the tools are best for planning and others for training, so look at the checklists and facilitation tips carefully.

TRAINING IN GELLIDEG

The PA team needed training in using the tools and in gender awareness. The training took three days and focused on interviewing skills, and checklists for inclusiveness by gender and age (see Tool 14, Interview recording, where there is an example of such a checklist), planning skills, working out how to engage people, documenting and recording information, and clarifying roles within the team. Training to analyse information was held later in the process.

3.4 Stage 4: Creating a timeline

A timeline needs to take account of the objectives of the work, the resources and time available, and the requirements and skills of the local context. It should follow on from a planning process. All timetables, whether for 45 minutes or four months, need a flow and logical progression to move from one point to the next.

The case study below is an example from Gellideg. Alongside it are details of how they adapted Stages 1-9 to suit their needs. Note that there are several days for reflection and review and also time built in for analysis.
A PLANNING TIMELINE FOR THE GELLIDEG FOUNDATION GROUP PROCESS

In the event some of the time estimates changed, and some events happened differently – as usual!

<table>
<thead>
<tr>
<th>Estimated time</th>
<th>Planned activities</th>
<th>Stage of process outline</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Week 1</strong></td>
<td>Initial workshop to discuss the funding opportunity, what it might mean for GFG and Gellideg and how to proceed. To be held with community members, GFG and local decision makers. Do some gender and participation awareness-raising.</td>
<td>1 and 2: Defining the aims and raising awareness</td>
</tr>
<tr>
<td><strong>Week 4</strong></td>
<td>One-day workshop with implementing team to explore gender issues, outline the aims of the survey, and pull together what information they already have and what they might need, as well as identify training needs.</td>
<td>2 and 3: Raising awareness, planning and training</td>
</tr>
<tr>
<td><strong>Week 5</strong></td>
<td>Three-day training event, focus on PA tools, gender, and planning the consultation.</td>
<td>3 and 4: Planning, training and creating timeline</td>
</tr>
<tr>
<td><strong>Week 6</strong></td>
<td>Informing; newsletter to residents publicising the work.</td>
<td>1 and 2: defining aims and raising awareness</td>
</tr>
<tr>
<td><strong>Week 6</strong></td>
<td>Research begins; the two youth workers start to interview groups in the community. Ongoing work.</td>
<td>5 Finding out</td>
</tr>
<tr>
<td><strong>Week 8</strong></td>
<td>Review day with trainers to review progress to date. How do the implementing team feel the interviews are going? Do they want help with specific tools to aid reflection on how the direction of the process is going?</td>
<td>5 Finding out 9 Reflection</td>
</tr>
<tr>
<td>Week 11</td>
<td>Review day with trainers to review progress to date.</td>
<td>5 Finding out 9 Reflection</td>
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<tr>
<td>Week 14</td>
<td>Review day with trainers to begin collation and analysis of information. Check to see if any gaps need to be explored further.</td>
<td>5 and 6: finding out and analysis</td>
</tr>
<tr>
<td>Week 15</td>
<td>Carry on gathering information to fill gaps.</td>
<td>5 and 6: Finding out and analysis</td>
</tr>
<tr>
<td>Week 16</td>
<td>Analysis and collation of information; planning the verification process.</td>
<td>6 and 7: Analysis and verification</td>
</tr>
<tr>
<td>Week 18</td>
<td>Verification day, community event</td>
<td>7 and 8: Verification and action planning</td>
</tr>
<tr>
<td>Week 19</td>
<td>Preparation of the bid document.</td>
<td>8 Reporting and moving forward</td>
</tr>
<tr>
<td>Week 24</td>
<td>Bid submitted.</td>
<td>8 Reporting and moving forward</td>
</tr>
<tr>
<td>Week 29</td>
<td>Review day – How did the whole process go, what did we learn? Plan report writing.</td>
<td>9. Reflection and evaluation</td>
</tr>
<tr>
<td>Week 35</td>
<td>Report finalised</td>
<td>8 Reporting and moving forward</td>
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</table>
3.5 Stage 5: Finding out

Carrying out a participatory appraisal is a process that develops its own momentum as it unfolds. The team implementing the process needs to be reviewing and checking the process as it happens.

It is helpful to develop a checklist of questions and issues for content and process.

It is also necessary to review the checklists themselves. A really essential tool to achieve this is the Interview recording sheet (see Tool 14). The team needs to develop the discipline of using these sheets to review both content and process.

A good process will be inclusive and move through information gathering, analysis, prioritisation and action planning, through to decision-making. It is therefore important to be reflecting on and challenging how inclusive the process is at all these stages.

There are two principle aspects to this – how you reach people and draw them into the process and how you then get them involved.

Making contact with people

There are many different ways of contacting people and raising awareness. These are likely to be different for men and women, older and younger people etc. Some people will be happy to talk, others will not, and you need to adapt your method accordingly.
**Snowballing** – This involves interviewing people who are already known to the PA team, and asking them to suggest other people who might be willing to be interviewed.

**Door canvassing** – This is an outreach tool, consisting of knocking on doors, explaining about the work and asking if the resident will participate in an interview.

**Informal meeting places** – An informal meeting place is an area where people gather such as a café, post office or shop. Any use of informal meeting places requires consideration of safety precautions for interviewers and passers-by. Street interviews can be successful but are not appropriate for exploring personal issues.

**Going to existing groups, meetings** – Ask if you can talk to people at existing activities; play groups, lunch clubs, etc.

**Focus groups** – Bring interested groups of people together, aiming for equal numbers of women and men, to discuss particular issues. Use this approach to work with particular groups of people to provide a ‘safe’ environment for the discussion. Think about when and where the meeting is held.

**Public meetings** – Good for verification and awareness but not for interviews.

**Public consultation road shows** – A bus can be hired and driven around an area taking the consultation to informal meeting places, eg shopping centres, cafes, outside sporting venues on match days etc.

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**ENGAGING PEOPLE**

Three main techniques were used in Gellideg to engage with disadvantaged people from targeted groups including single parents, people with disabilities, unemployed people, ethnic minorities, and drug users. **Snowballing** developed the youth workers’ own confidence in using the tools. The youth workers received varying reactions when **door canvassing**. The male youth worker found he had the same reaction from men and women. The female youth worker found that male residents, especially if over 50, would suggest that she speak to their wife.

Halfway through the appraisal, the monitoring mechanisms showed that not many young or middle-aged men were coming forward to be involved. To address this, whilst continuing with door canvassing, the workers stood outside the shops and canvassed men as they passed by. Sometimes they agreed to a **street interview**, or they arranged an interview in their home at another time. Using a male and female youth worker was very effective in reaching both sexes and all ages.

Ninety per cent of the interviews were with individuals. People had a lot to say because they rarely got the opportunity to talk about the issues they faced. Often individual interviews progressed to group interviews because informal groups would gather in the household as the interview progressed.
Getting together

Meetings are only one way of getting people together; individual interviews are also important – see above.

The subject of some meetings will sometimes attract one sex more than the other. For example, childcare discussions are likely to attract women more than men, but both sexes need to be involved in decision-making processes around childcare issues. Children and young people may also want to be involved; they are often excluded from debates around childcare and play provision as it is assumed to be a parent’s concern.

Often service delivery and planning occurs with no gender awareness. By not taking into account the different needs and situations of women and men, the service or plan will be accessible to one gender more than the other. Incorporating a gender analysis into service planning and delivery enables organisations to ensure that it includes men’s and women’s needs in organisational goals and methods of achieving those goals. For example, renaming a childcare project a ‘Parent and toddler’ rather than ‘Mother and toddler group’ will make it more accessible to fathers. Sometimes service providers feel they have complied with equality of opportunities policy because they are operating an open-door policy for both men and women of any age that want to access the service. Through the gendered PA it will be possible to demonstrate the barriers that often make an open door policy unusable for many men and women.
The main issues to consider when planning a participatory meeting or workshop are:

- Levels of confidence in speaking. Small groups encourage confidence.

- The timing of the meeting is important – for example, not at children's meal times, during religious holidays (e.g. Eid), giro day, or football matches.

- Transport. Is the meeting accessible? Women use public transport more than men, younger and older people more than people of working age, people with disabilities may have their own support or transport requirements.

- Safety of venue. Men, women, older and younger people feel threatened by different things.

- Culture. Who will speak out? Who is likely to feel constrained to speak? How many men or women are there? Who is likely to not be heard?

- Diversity. Who is likely to be excluded? Take steps to ensure the inclusion of young and old people, black and minority ethnic groups, benefits status, people with disabilities, different faith groups, people who speak a different language.

- Who is unlikely to come to a meeting? Use different additional techniques to give everyone the opportunity to be involved. Take into account who is likely to feel most comfortable at such a meeting and look for ways of attracting other people, using a range of methods.

- There will be common assumptions about the content of any meeting. Identify such preconceptions to ensure the meeting progresses beyond them and discusses what people actually need.

- Using posters with provocative messages (e.g. ‘everything is Hunky Dory’) has proved successful in grabbing people’s attention and persuading them to attend meetings.

Always ask yourselves how these ways of contacting and involving people affect their ability to participate. Different stakeholders will feel comfortable sharing information in different situations. For example, men or women might feel more comfortable being interviewed individually at home, or in a single sex group. Or on sensitive issues, by being asked general questions like: ‘What do people in the community think/do?’ as opposed to: ‘What do you think/do?’ Different age groups might prefer to work in different spaces, and at different times. Think about timing and location – what is a good time for different people to participate? Is the location accessible to the group you have invited? and so on.
Using the tools

Exploring different issues will require different facilitation approaches. Gendered issues about sharing household resources and responsibilities are more likely to come out in individual interviews where others are not listening in. Generally individual interviews use three or four diagrammatic tools, sometimes with semi-structured interviews (making notes after, rather than during, the interview). Individual interviews explore sensitive issues in an environment and at a pace that is comfortable and safe for participants. As information is gathered, check that the tools being used are appropriate, are yielding the information that is needed, and that the most marginalised people in the community are being reached.

It is important to plan beforehand which tools will bring out the issues in the interviews, and to ‘sequence’ the tools so that they allow you to explore issues in a logical and easy way.

Some tools are good to start a discussion going – for example, a mapping tool that asks quite general and open questions is always useful to start an interview. The next tool could be one that would take some of the issues raised in the first exercise and explore them a little further, or start to prioritise them or think through solutions; a spider diagram, ranking tool or managing wheel. The sequence moves from general reflection, through to analysis, and then prioritising or ranking and thinking through solutions. This can be done in one session (see box below), or at consecutive sessions.
A SHORT GENDERED PARTICIPATORY PROGRAMME

This was a short gendered action planning day in Cae Mawr. The session started with an exercise that generated an overall sense of the community. It then progressed to look at problems that people faced in the community, and finally worked with the group to identify practical solutions.

The solutions and barriers were analysed before they were timetabled and reviewed. The analysis ensured there were short, medium and long term goals identified and that planned activities were pitched at right level (personal, social or structural). The tools used to reach this sequence of action planning were:

**OK not OK** – giving a picture of community relations (45 minutes).

**Problem wall** – building on the ‘not OK’ part of the previous tool, and adding other barriers (45 minutes).

**Solution tree** – building on the OK part of the first tool, and adding other potential solutions (45 minutes).

**Personal, social, structural** – analysing identified barriers and solutions (1 hour+).

**Timeline** – to plan and prioritise the solutions the group wanted to implement (1.5 hours).

Checking who has been involved and how they feel about it

It is important to keep a check on who has been involved in the process. There are a number of ways to do this; the key one used at Gellideg was the interview recording sheet (see Tool 14). For each interview it was recorded who was involved – men, women, what age group etc. As the participatory assessors went along they kept an eye on the total numbers of men and women from the three different age groups they were working with, summarising the data in a small table (see box below). In this way they were able to identify which group was poorly represented and where they needed to increase efforts to meet certain people and bring them into the process.

It is important to keep a check on how representative your participants are of the community – are different groups adequately represented? The interview recording sheet and a table like the one in the box below are useful for collecting information on gender, age, ethnicity, status, etc.

To collect information on where people come from, you could keep the record on a map. A street map of the community is useful for this – either a published one or one drawn within the community. You can ask participants to indicate on the map where they live – either with a pen mark or with a sticky dot. If you colour code the dots according to gender, age, or whatever, this will help develop a picture of the geographic reach of your work. Are there gaps in the map where you are not meeting people? What can you do to remedy that?
MONITORING MEN AND WOMEN’S PARTICIPATION
In Gellideg, after a large number of interviews had been carried out, the team went through all the interview recording sheets and totalled the numbers of men and women that had been involved in the interviews. The results were as follows:

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Women</th>
<th>Men</th>
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<tbody>
<tr>
<td>16-25</td>
<td>16</td>
<td>6</td>
</tr>
<tr>
<td>25-50</td>
<td>25</td>
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<tr>
<td>50+</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>49</strong></td>
<td><strong>24</strong></td>
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This helped them realise that they needed to speak to more men, especially those between 16 and 25 and both men and women over 50.

Useful summary checklist for this stage:
1. **Collecting information** Are you using a mixture of methods and tools? Are you interviewing different groups? eg young women, young men, older men, older women, men and women who can’t get out and about.
2. **Reaching people who seem invisible** How easy or difficult is it to reach certain groups, individuals, and different places in the area? How could you solve these problems?
3. **Bringing out the different barriers experienced by different people** How do issues differ for different people? How would solutions differ?
4. **Showing the difference** How can you present the information so you can show the differences between people? And how can you check it?
This is where all the information gathered is brought together. By this point, you are happy with the extent of the information gathered; you have adequately answered your initial questions and are confident that you have reached a good cross-section of the community. Again, the interview recording sheets become an essential tool to guide you through the wealth of information gathered. This is a big task.

**Collating and analysing information**

This is a two-stage process. The first stage is to collate by age and gender (see Tool 15 Gender and age matrix).

The second stage is to look at each of the clusters of issues raised by age and gender and to analyse these issues using the personal, social and structural matrix (Tool 16). This matrix will enable you to explore the barriers and opportunities facing each issue by age and gender.

For example, in Gellideg it became clear that service provision was an important issue for women between 16 and 25. When this was analysed by personal, social and structural, it emerged that the barriers included: lack of confidence in accessing advice and information, lack of services locally and lack of transport to remote services. See diagram in Tool 16.
**ORGANISING INFORMATION**

In Gellideg it took us a day to get to grips with how to organise the information, and many more days to actually go through all the interview data. The whole team was involved, which was really important. The matrix outlined in Tool 15 (Gender and age matrix) facilitated this process considerably, and as a tool can be used with a small or large group. Depending on the purpose and manner in which a PA is carried out, the tool can be used as we did in Gellideg for collating months’ worth of information, or it could be used by participant groups to collate their own findings and discussions in a focus group.

**Triangulation - cross-checking**

An important principle of PA is ‘triangulation’. This involves a process of cross checking with different sources of information – did different people in different interviews raise the same issues? Were the same issues raised even when different tools were used to explore them? What does this have to do with gender, age, anything else?

As you go through this collation and analysis stage, you need to look for common threads and differences. You need to review these, and you might identify further questions to answer or gaps within the information/analysis. It is important that you allow extra time to carry out some more research if needed to fill those gaps and answer those questions.

It is also important to stress that the focus of the process is on action planning and decision-making, not just understanding the issues within the community. However, any solutions need to be checked against the range of issues within the community.
3.7 Stage 7: Verification and action planning

Verification and action planning can be done at the same time, or could be two separate processes. It depends on the situation – the relationship you have with the community, the way the community is involved in the process, the nature of the issues to be addressed.

The basic principle of verification is that if a few people in the community have been involved in the analysis, (which is often the case), it is important to check the conclusions with the wider community. This is because:

- It allows for the wider community to comment and check for accuracy.
- It enables a large number of people in the community to comment, making the conclusions more valid.
- It enhances inclusion, ensuring that a number of people are involved in prioritising issues, identifying what needs to be done, and developing action plans.
- It aids transparency. People not interviewed can see how the information has been used and those interviewed can see how their input has been included.

It makes sense to verify conclusions before moving into action planning, but the process of verification can seem a little pointless if it does not include the question: ‘If this is right, what do we need to do about it?’ So the process by its nature leads into action planning.

Alternatively the action planning might happen before the wider verification – what you want the wider community to review are the plans for change.

Verification and action planning methods will depend on context, time and resources. It is usual to use a combination of methods so that maximum numbers of people are reached. Examples include:

1. **Holding large community meetings** Summarise PA outcomes and plans for the next steps in a visual form (eg spider diagrams) and use tools to hear and gather people’s comments. Advertise the meeting in different parts of the community and inform all interviewees of the meeting by letter. This form of verification works best as a community day, and should be fun and fluid.

2. **Conducting smaller focus group meetings** These can be useful if there are community tensions, or if some groups in the community do not agree with the conclusions. They enable in-depth discussion and exploration.

3. **Producing and circulating information and requesting feedback** Generally, only 20 per cent of people respond to questionnaires. So it is necessary to undertake face-to-face verification with local groups. Circulating information is not necessarily just to get a response. It is important in itself. You could do this in many ways, for example through local radio as well as by newsletter, etc.
4. Presenting collated information and asking for feedback in public spaces. 
   Ensure that the public space you use is frequented by different sections of the community. Examples of public spaces include schools, shops, libraries etc.

5. Creating a mobile ‘exhibition’ Present your findings as an exhibition and take it to different groups and public spaces. This can be used at a community event, such as a sports day at school, or a football match.

It is important to think through what you want at the end of the verification process, to ensure that you make the best use of the time involved. You need to ensure that you have reached a point where you feel that you are not getting any new or different information and feel happy with the level of knowledge/information that you have.
3.8 Stage 8: Reporting and moving forward

You will need to look at who is involved in the planning process and again ensure that both men and women are taking part.

In any research process, there will be information that is sensitive and needs careful communication. There are four main issues to consider when submitting a report:

- Representing information without jeopardising your relationship with the interviewee and the community as a whole. Never refer to individuals without checking it out with them first. Some issues need careful, respectful reporting. If in doubt, report sensitive issues more vaguely than you would like to. This will avoid any repercussions being experienced by participants, the wider community or the implementing team.

- Dealing with other people’s perceptions of what you are doing, especially if they feel threatened by it. Occasionally this will not be overcome. However, taking steps to ensure that the community is fully involved in the process should reduce the likelihood of people feeling threatened.

- Avoiding surprises and unfulfilled expectations. Ensure that everyone knows what you are doing and why.

- Considering and respecting peoples’ right to anonymity where necessary.

At the end of the process the momentum for community involvement should continue. This last stage should ensure that a cycle of planning, finding out and action is established, otherwise the PA becomes a one-off consultation.
3.9 Stage 9: Reflection and evaluation

It is easy to overlook this stage when having completed a large piece of work; however, it is important for all parties directly involved in the PA, especially the members of the implementing team, to have the opportunity to reflect on the whole process. Reflection is important because it enables you to stand back from the process and to assess whether the original aims were met, how people felt during the process and what could be done better or differently next time. This is where the learning is captured.

The nature of the review will vary according to the purpose of the PA workshops, but if there are disagreements, it can be worth including an anonymous review.

**GELLIDEG REVIEW**
A review workshop for the implementing team was held to reflect on the process. Summarised, the results were:

- The amount of time that a PA requires should not be underestimated.
- ‘Snowballing’ to engage with people can be very successful, but checks need to be in place to ensure the most marginalised are reached.
- In a safe environment, people will talk about personal issues and the tools are effective in promoting discussion. Allow the space and time to accommodate this.
- Public meetings do not work for exploring personal issues, so participatory approaches that usually work with people in public spaces need to be adapted.
- Issues are likely to arise that challenge the team personally and they will need support to debrief as soon as issues arise.
PORT TALBOT REVIEW
After the training, a participatory evaluation was used to review what had been learnt and what participants found useful. The results were:

- Gender is just as much an issue for men, but often it is only seen as a ‘woman’s thing’.
- The tools are useful, can be adapted for different groups and are really good used with young people.
- Analysis tools take time and this can be underestimated.
- It is quite intense experiencing individual interviews, but practising and using visual techniques reduces the potential stress. Everyday language to describe ‘gender’ is easy to use and just as effective. For example, ‘gender analysis’ is ‘looking at the differences between men and women’ or examining the ‘exclusion of old men/young women etc.’
4. THE TOOLS

‘The tools were useful as a starter. They helped us to find a way into the discussion, to get it going.’
Mark, youth worker, Gellideg estate

Some of these tools may already be familiar to people. They have been adapted to highlight gender issues.

Each tool has a step by step explanation. The information given includes:

- A chart at the beginning detailing which stages in the facilitation process the tool is useful for – many tools can be used for different purposes.
- The purpose of the tool.
- Facilitation tips.
- Materials needed.
- Method.
- Additional variations and developments with particular emphasis on further exploration of gender and diversity.

Examples are given to illustrate the tool a little more. Sometimes these are diagrams, based on the work that was carried out in Gellideg, that help the reader understand how each tool progresses visually, and sometimes these are descriptive, based on the work in the pilot projects. Many of these are split into ‘content’ – what was discussed, what people found out etc and ‘process’ – what happened and what people felt about it.
There are some general principles when using the tools – for example, it is useful to record age, gender etc of participants for any future data gathering. Decide who should record the discussion – it could be the person on the implementing team who is doing the facilitation, but could equally be one of the participants, which gives them more control over how the session is recorded. But be aware of literacy levels and how confident people are with writing – they could just use symbols or ticks and crosses.

Tools can be modified, adapted and invented to gain in-depth understanding of residents’ lives.

**Additional tips**

Tools for use in Stage 3 are marked ‘T’ for training and ‘P’ for planning to guide the user as to their exact purpose.

If using tools for Stage 5, ‘Finding out’, be sure to look at the facilitation tips because not all tools are suitable for use in a group situation.

The gender and age matrix is a really important part of a gendered PA as this is where all the information gathered is pulled together and analysed.
4.1 Tool 1: Play detective

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<th>Stage 1</th>
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<th>Stage 7</th>
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<tr>
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<td>Timeline</td>
<td>Verification and action planning</td>
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<th>Stage 2</th>
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<th>Stage 8</th>
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<tr>
<td>Raising awareness</td>
<td>Finding out</td>
<td>Reporting and moving forward</td>
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<tr>
<td>Planning/training</td>
<td>Analysis</td>
<td>Reflection and evaluation</td>
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Purpose

- Explore the assumptions and prejudices that we use and impose on each other as we interact with people and information.
- Explore how assumptions made by men, women, old and young differ.
- Explore the stereotypes that exist for men and women, old and young.
- Distinguish between what we infer from data and observations and what is fact.
- Raise awareness of how our prejudices and assumptions affect our judgement and information-gathering skills.

Facilitation Tips

- Approach in a light-hearted fashion as it can be quite personal.
- Works best with someone that the participants do not know well.
- Ask questions continually to the group to deepen discussion at the end.
- If working with a large group, continue the discussion part in small groups and leave time for feedback between the groups at the end.
- Draw out why it is important – assumptions, prejudice and opinions.
- The facilitator needs to be prepared to be commented about – if unsure then use a famous person or general images instead.
What men and women want
A PRACTICAL GUIDE TO GENDER AND PARTICIPATION

Materials
Flip chart paper with two columns on each sheet
Pens for each group.

Method
- Ask participants to get into groups of not more than six and give each group pens and flip chart paper with two columns drawn on.
- Ask the participants to list in one column what they actually know about the person facilitating.
- In the other column ask the group to list what they have deduced about them.

- If there is more than one group, bring the groups together and hold a discussion asking:
  
  About the assumptions: Were the deduced items arrived at through observation or extension of fact? Were the assumptions negative or positive? Were they judgemental? How accurate are they?
About people making the assumptions: What different assumptions did men and women in the group make about their own and the opposite sex? Do they affect judgement and respect?

The basis for the assumptions: Did the gender, age or identity of the trainer determine any assumptions? How much were the assumptions based on ‘stereotypes’ of gender, age and other identities?

Variations and developments

- Use photos to explore different types of people, rather than the facilitator – TV stars, politicians etc. Use characters that vary in age, sex and identity, or characters from films, or Barbie and Ken.

- Break participants into single-sex groups, age-equivalent groups, and explore differences in assumptions made.

- If an issue arises that needs exploring, use a problem wall and solution tree analysis (see Tool 9).

GENDER AND DEVELOPMENT CONFERENCE WORKSHOP

Learning about Content

People were surprised at how they thought they knew things, but actually did not. For example, most groups thought the facilitator was aged 23-29 when the actual age was 33. A discussion looked at how assumptions influence opinions, and how preconceptions, such as age, influence what we expect from people and how much we expect them to understand.

The groups agreed that assumptions were often based upon hearsay (ie from other members of the group, non-verbal communication and expectations based upon opinions and past experiences). Finally, the discussion looked at how assumptions may be translated into everyday life.

Learning about Process

People found this an easy tool. But it can be personal, and could be difficult to facilitate if there are tensions between the group and the facilitator or other issues effecting group dynamics. It needs time to unpack and query assumptions and explore what these mean in terms of gender and participation.

It can be useful to point out we assimilate information all the time. Only seven per cent of communication that we pay attention to is verbal, so as humans we work with non-verbal communication most of the time – and this means making assumptions. We just need to be aware of what assumptions we make and whether these lead us to be prejudiced.
4.2 Tool 2: What work do people do?

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<th>Stage 1</th>
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<tr>
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<td>Verification and action planning</td>
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<td>Raising awareness</td>
<td>✓</td>
<td>Reporting and moving forward</td>
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<td>Stage 3</td>
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<td>Planning/training</td>
<td>✓ (T)</td>
<td>Analysis</td>
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**Purpose**

- To find out what work men and women do in a location or community.
- To aid recognition that ‘work’ is not just paid but also unpaid work.
- To show that there are different kinds of work.
- To show that unpaid work may mean caring work (for children, older people, people with an illness) or household work (cleaning, cooking, household maintenance).

**Facilitation tips**

- Use with men and women/girls and boys, in a workshop situation.

- Make the point that women do most of the unpaid work and that men, women and decision-makers do not value this in the same way as paid employment. Ask who is doing unpaid work, and how it is valued compared to paid work.

- Emphasise that unpaid work may not be seen as ‘real’ work, but is often just as hard and ‘expensive’ of time.

**Materials**

Flip chart and pens.

**Method**

- Split group into groups of four and give each group a piece of flip chart paper and a pen.
• Brainstorm on the flipchart paper all the jobs done by people from the locality.

• Ask the groups to write next to each job whether it is undertaken by men, women or both.

• In each group, discuss whether there is anything that’s been forgotten. Is there anything that is work but isn’t a paid job?

• Ask each group to write a new list of examples of work that isn’t a paid job.

• Ask the groups to write next to each example of work whether it is undertaken by men, women or both.

• Ask the groups to look at both lists and discuss which roles are most valued and who fulfils them and are there any people in the community who do not have any valued roles?
Variations and developments

- To start people off, use a prompt such as a postcard or transparency (right).

- Twin this tool with local facts (See Tool 6), to bring out how women take part-time work to fit around caring work, end up in their early twenties earning less than men, creating the gender pay gap and financial disadvantage over a lifetime.

PORT TALBOT

Content

It was easy to come up with jobs that men and women do, but people were reluctant to stereotype them as ‘just men’s work’ or ‘just women’s work’. This was resolved through qualifying that there would be exceptions, but generally some occupations are dominated by men or women. It was useful to have some figures about the concentration of men and women in different occupational sectors in Wales.

In feedback, people were surprised that they hadn’t given any consideration to unpaid work at the start of the tool. They discussed how men are perceived differently to women when they undertake the same caring or domestic duties. Initially it was hard for the groups to think beyond ‘housewife’ but with prompting to think about maintenance and the home, budgeting and buying, the groups generated a long list of unpaid work.

Process

The feedback discussion is really important for unpacking the nature of paid and unpaid work as well as perceptions that exist of men’s roles and women’s roles. It worked well to phase the instructions given to the group rather than outlining the whole process before the group starts.
4.3 Tool 3: The ladder of life

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### Purpose
- To illustrate how the typical life paths of boys and girls lead to different realities for men and women.
- To illustrate how we all work with typical notions of what happens to boys or girls, and that we expect boys and girls to be different.
- To explore whether participants believe that what happens to boys and girls is the result of biology or social pressures.
- To illustrate that general expectations of boys and girls are stereotypes.

### Facilitation Tips
- With small groups, in a workshop situation.
- This can get very raucous and loud, and is usually great fun.
- If some of the ideas presented by participants seem a little outrageous, just ask – is that really something that could happen here? But avoid too much censoring!
- It is important for ‘the player’ to be able to ‘debrief’ from their role – to come out of it and discuss it as themselves again.

### Materials
Flipcharts, pens, chalk and three different colours of card.
What men and women want
A PRACTICAL GUIDE TO GENDER AND PARTICIPATION

**Method**

- Ask for a volunteer from the participants to be the player. If the group contains men and women select a male and female volunteer and undertake the exercise first with one sex and then the other.

- Divide the rest of the group into two. One half are the Snakes and the other Ladders. Give each group pens and a set of different coloured cards.

- Draw a ladder on the ground with the chalk or use paper to form a ‘stepping stone’ path.

- Give the player the third set of different coloured cards and a pen.

- Ask the player to start at one end of the ladder. The game explores what happens to a typical boy and girl as they are growing up in their community in their town. As they grow up certain things will work in their favour (the Ladders) and others work against them (the Snakes).

- Start by asking the Snakes and Ladders to describe the young person at the beginning of the ladder – their family circumstances, likes, dislikes. This should be a fictional character based on the reality of boys’ and girls’ life chances in that community.

- The player then starts to move up the ladder (ie get older). The Snakes write a setback on their card and place it on the ladder in front of the player. Make it clear that Snakes and Ladders take it in turns.

- The player decides what a young man/ young woman would do in reaction to this setback. They write their reaction down on their card.

- The Ladders consider the player’s reaction and provide a solution (typical to the kind of solutions that arise for a young man/ woman in their area) to help the player overcome the hurdle. This solution is written on the Ladder’s card and placed on the ladder.

- The player can now move on until the Snakes provide another problem.
The game continues through the life course of the man/ woman. Allow 30 to 40 minutes for this.

The groups then compare the life paths they have outlined and discuss how typical the paths are. Are there any patterns in the problems, reactions and solutions? Are these different for men and women?

Discuss why they are different and whether they have to be.
<table>
<thead>
<tr>
<th>Snakes</th>
<th>Ladders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Falls pregnant when 16</td>
<td>Good family background parents supportive</td>
</tr>
<tr>
<td>Falls in with a drug dealer</td>
<td>Gets counselling</td>
</tr>
<tr>
<td>Her mother dies</td>
<td>Gets a place at college</td>
</tr>
<tr>
<td>In a car crash paralysis</td>
<td>Goes on benefits</td>
</tr>
<tr>
<td>Suffers depression</td>
<td>Manages to find creche facilities so can carry on at college</td>
</tr>
<tr>
<td>Loses money to debt collectors</td>
<td>Gets a big insurance payout which means she can start her own business</td>
</tr>
<tr>
<td></td>
<td>Marries a wealthy businessman!</td>
</tr>
</tbody>
</table>

*(girl)*
Variations and developments

- This can be played using simpler methods – with chalk on the floor, or by drawing ladders (one for a boy and one for a girl) on paper. Then invite participants to talk through the different opportunities and barriers faced by boys and girls, men and women in the community. Plot these two paths across the floor and through the discussion, and then prompt with ‘What happens next?’

- The group sizes and content can be varied – in pairs, small groups, single sex or mixed groups exploring their own sex the opposite sex, or both.

- Use to explore diversity differences as well as gender differences.

- Ask participants to share real-life stories about gender differences, either from their own experience or someone they have known.

- In single-sex pairs explore barriers and openings participants have faced.

- Examine how stereotyped ideas about what boys and girls do can shape their futures but are not unchangeable.

- Follow with ‘local facts’ to compare assumptions with local statistics.

PORT TALBOT

Content
The ‘ladder of life’ created was of a young woman who had three younger brothers and an older sister. They lived with their mother on a south Wales estate. The young woman was bullied at school and began self harming. She missed classes and attended an alternative curriculum centre. She took up with a university lecturer, became pregnant and moved in with him. They split up, but he offered financial support for her child. She moved in with her older sister who supported her with childcare so she could go back to college. The feedback discussion was useful for exploring the fiction and reality of people’s lives, such as isolation of young mothers, self harm etc.

Process
This tool is good fun, but care needs to be taken to point out its purpose, as it can seem like just inventing stories. Although it is fictional, the important part of this tool is to base the fiction upon people’s own experiences and knowledge of an area – not just on what the media reports. Some participants felt they were reinforcing stereotypes through this tool, but found it useful for exploring real situations by asking ‘Does that happen?’
4.4 Tool 4: A basic gender analysis

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 4</th>
<th>Stage 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defining aims</td>
<td>Timeline</td>
<td>Verification and action planning</td>
</tr>
<tr>
<td>Stage 2</td>
<td>Stage 5</td>
<td>Stage 8</td>
</tr>
<tr>
<td>Raising awareness</td>
<td>Finding out</td>
<td>Reporting and moving forward</td>
</tr>
<tr>
<td>Stage 3</td>
<td>Stage 6</td>
<td>Stage 9</td>
</tr>
<tr>
<td>Planning/ training</td>
<td>Analysis</td>
<td>Reflection and evaluation</td>
</tr>
</tbody>
</table>

**Purpose**

- To gain an understanding of how men and women negotiate resources and power between each other.
- To reach beyond opinion and look at the reasons behind men and women’s opinions, experiences and actions.

**Facilitation tips**

- Encourage participants to tell real-life stories, but ensure that they feel safe telling them.
- Draw focus from people’s story onto gender analysis questions outlined.

**Materials**

Facilitators’ and participants’ stories, or videos, newspaper cuttings, play, testimonies
Method

- In small groups of five, either ask for a story from two participants that reflects differences between men and women, or use a story from a play, newspaper etc. If using participants’ stories, check that they feel comfortable sharing within the group and that the story can be based upon their experience, but not necessarily about themselves. If participants are unsure about their own stories, start with one from the newspaper or case study, and then after that has been explored, ask if anyone has another story that could be used.

- Once stories have been shared, draw out the differences between men and women within the stories, working through gender analysis questions:
  - What kind of barriers do men and women face?
  - Who has what?
  - Who owns what?
  - Who makes decisions?
  - Who gains and who loses?

The focus is not upon who ‘wins’, but upon how vulnerabilities are created through, for example, differences in qualifications and skills, the assumptions about who does what, differences in earning power, the freedom to move around, vulnerability to violence etc. Point out how men and women are vulnerable in different ways; that women usually end up poorer than men; and that women do more unpaid work.

PORT TALBOT

Content

Using the topic of ‘education’, the group explored how to use stories from personal experience as a basis for wider gender analysis discussion. This was hard for some people who had been to segregated schools so we widened ‘education’ out to include college and university. We found that institutions themselves reinforce traditional gender roles. Everyone had a story, and it worked well moving from personal experience to a wider discussion about boys’ and girls’ power differences in school or college.

Process

People have plenty of stories, but may need some encouragement in telling them. Often people think their story is ‘trivial’ or that they haven’t got ‘the right one’. When using this tool ensure that people feel empowered rather than anxious in telling a story, through prompting questions, giving positive feedback and sharing experiences in small groups of three rather than in large groups. It is important to emphasise confidentiality and ensure that no-one is telling a story that they may later regret sharing. This is a flexible tool in terms of depth of discussion and could be quite quick (20 minutes) to give an introduction to using stories or gender analysis questions, or quite in-depth to discuss a particular topic. If using this tool for in-depth research do allow enough time for all stories and questions to be discussed.
4.5 Tool 5: Sweet and sour

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<th>Stage 1</th>
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<tr>
<td>Defining aims</td>
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<td>Timeline</td>
<td></td>
<td>Verification and action planning</td>
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<th>Stage 5</th>
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<th>Stage 8</th>
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<tbody>
<tr>
<td>Raising awareness</td>
<td></td>
<td>Finding out</td>
<td></td>
<td>Reporting and moving forward</td>
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<tr>
<th>Stage 3</th>
<th>✓</th>
<th>Stage 6</th>
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<th>Stage 9</th>
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<tbody>
<tr>
<td>Planning/ training</td>
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<td>Analysis</td>
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<td>Reflection and evaluation</td>
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**Purpose**
- To explore the advantages and disadvantages of possible choices.

**Facilitation Tips**
- A good exercise to gain clarity around a choice that has to be made between two courses of action.
- Use in group work with community members, practitioners or trainees.

**Materials**
Flip chart divided in two columns OR two different colours of Post-it notes and pens.
**Method**

- Divide the group into groups of about six.

- Outline the issue or action that is to be considered

- Ask the groups to brainstorm together all the disadvantages/‘sour things’ about a course of action or an issue, making a note of each point in the first column on the flip chart, or on one colour of Post-it note.

- Ask the group to brainstorm all the advantages/‘sweet things’ about taking a course of action, making a note of each point in the second column of the flip chart or on different coloured Post-its.

- Gather feedback from each group and as one large group discuss and assess whether the ‘sours’ outweigh the ‘sweets’ and make a choice.

<table>
<thead>
<tr>
<th>SOUR</th>
<th>SWEET</th>
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</thead>
<tbody>
<tr>
<td>Not in control of the process</td>
<td>Training oppportunities for young and old</td>
</tr>
<tr>
<td>Complexity of funding</td>
<td>Good opportunities for own business</td>
</tr>
<tr>
<td>Need to be realistic about what we can achieve</td>
<td>Local creche facilities</td>
</tr>
<tr>
<td>Problem of money - people can’t afford to pay charges but needs to be sustainable</td>
<td>Community cyber café</td>
</tr>
<tr>
<td>Problem of money - people can’t afford to pay charges but needs to be sustainable</td>
<td>Better job prospects</td>
</tr>
<tr>
<td>Problem of money - people can’t afford to pay charges but needs to be sustainable</td>
<td>General local services for the community</td>
</tr>
<tr>
<td>Problem of money - people can’t afford to pay charges but needs to be sustainable</td>
<td>Stop people moving away</td>
</tr>
</tbody>
</table>

**Variations and developments**

- Could be used in single sex groups to explore and then compare differences in how men and women, girls and boys perceive the choice differently – and therefore make a more informed decision.

- Could be done by a mixed group and then colour coded to see if there are gender differences in their views of sweet and sour.

- This is a useful evaluation tool; simply ask what was good/sweet and/or bad/sour about the experience or process. If you have the opportunity, take the ‘sours’ forward in discussion, explore them a little more, and propose ways to make them better the next time.
4.6 Tool 6: Local facts

**Purpose**

- To understand the basic facts about the lives of women and men.
- To build awareness about the difference between fact and personal perception.
- To explore where our perceptions may come from.

**Facilitation tips**

- Vary the complexity of the statistics to suit the needs of the group.
- It is a fun tool that works well in a question and answer format.
- If using as a quiz, be sure to draw out what the statistics mean.

**Materials**

Handout of statistics and flipchart for groups to write up ‘the answers’.

**Method 1**

- Split the group into teams or pairs.
- There are a number of ways of doing this exercise: either talk through the statistics, asking groups to make a note of what surprises them, or read statistics out as questions or multiple choice questions, or use as a quiz.
- Once all the questions in the quiz have been read out, ask each group for their answer and then let them know the right statistic.
- After each answer has been given, facilitate discussion about what the figure suggests, whether it is surprising and what it means in practice.
Method 2

- Split the group into teams or pairs.
- Give out the quiz as a case study.
- Ask them what surprised them about the statistics.
- Discuss this in their groups or pairs.

Variations

- Develop a local list of statistics, using local authority and services data.

CONFERENCE WORKSHOP

Learning about Content

Some of the statistics really surprised people. Some quiz teams thought the teenage pregnancy rate was 20 per cent rather than 3.5 per cent. All groups underestimated the pay gap between men and women when part-time workers were included in the statistics. People were shocked that levels of educational achievement were so low and that boys did so much worse than girls at school, because men still earn more than women by the time they reach 21. In discussion it was decided that assumptions come from personal experience but that the media has an overwhelming influence.

Learning about Process

A local facts quiz works well, is easy and fun in teams. Taking answers from each group for the quiz allows for exploration of where our assumptions come from and unpacks the statistics a bit. This is the best way of relating numerical information to experience. For example, the discussion included education services for young mothers, support for young fathers, what lack of childcare means for women’s lives etc. One person commented on how it makes young women feel when teenage pregnancy is viewed as ‘bad’ and what this may indicate about our opinions towards young people. Time needs to be allocated for this kind of in-depth feedback and round-up discussion.
Quiz with statistics from Wales.

Education
1. What percentage of girls and boys gain five or more passes at GCSE level on leaving school?

Employment
2. What percentage of male employees work part time?
3. Is the pay gap between men and women full time employees 33%, 13% or 20%?
4. Including part time workers and unpaid people, what is the percentage pay gap between men and women?

Family Life
5. What percentage of mothers with children under five are in work?
6. How many childcare places in Wales are available for children under the age of 8? Is it 1 place for every 10 children, 1 place for every 5 children or 1 place for every 7 children?
7. What percentage of households in Wales are headed by a lone parent?
8. Which country in Europe has the highest teenage pregnancy rate – Wales, Scotland or England?

1. These can be adapted to the local context. The Welsh statistics are very similar to statistics for the UK: see www.statistics.gov.uk or www.scotland.gov.uk/stats/people.htm or www.nisra.gov.uk
Answers

1. On leaving school 56% of girls gain five or more passes at GCSE level. The figure for boys is 45%. Boys achieve less than girls generally in education – this impacts on engaging with young men.  

2. 9% of male employees of working age in Wales work part time. 46% of women employees of working age work part time. This affects available money, and social availability eg going to meetings, times of training, needing crèche etc.  

3. The pay gap between men and women full time employees is 20%. Generally women earn 83% of men’s pay. The average woman’s full-time working wage is £345 per week. For men it is £433 per week.  

4. When part-time workers are included, the pay gap rises to 42%. Women’s average income is £128 per week and men’s is £219.  

5. 49% of mothers with children under five are working. However, the majority of these are working part time. 87% of fathers with children under five work.  

6. Childcare places are only available for 1 in 5 children under the age of 5 in Wales. In some areas, eg Merthyr, this drops to 1 in 10. Two-thirds of the available places only cover half the working day. There are no available figures for primary carers, but it is assumed that it is mainly women who work part time or in the home to fit in with caring responsibilities.  

7. 11% of households are headed by a lone parent. Nationally the vast majority of lone parents are women, and this impacts on their income and time. Around 10% are men.  

8. Wales has the highest teenage pregnancy rate in Europe at 3.5%. Teenage fathers are not visible in statistics, and there is little support for them.  

References:

2. School Performance Information, National Assembly for Wales Statistical Directorate
4. New Earnings Survey 2002 (from Nomis), Office for National Statistics
5. Individual Incomes 1996/97 to 2000/01, Women and Equality Unit, DTI
4.7 Tool 7: Planning timeline

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 4</th>
<th>Stage 7</th>
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<tr>
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<th>Stage 2</th>
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<th>Stage 8</th>
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<tr>
<td>Raising awareness</td>
<td>Finding out</td>
<td>Reporting and moving forward</td>
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<th>Stage 3</th>
<th>Stage 6</th>
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<tbody>
<tr>
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<td>Analysis</td>
<td>Reflection and evaluation</td>
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### Purpose
- To create a coherent timetable for the gendered PA activities.

### Facilitation Tips
- Allow plenty of time to undertake the gendered PA, particularly for analysis and verification as these stages often get forgotten or squeezed.
- Start with activities that need to be in place at the end of the process and work backwards.
- Undertake this exercise as a whole team group, unless there are more than six people. If there are more than six, divide into smaller groups.
- If individuals are given responsibility for activities, ensure that the planning itself is gender aware and that timings fit in with gendered needs (eg some women may prefer activities during term time).
Materials
Post-it notes and pens
Paper and sellotape

Method
- Draw a timeline on a large piece of paper that can be stuck onto the wall. Write in the dates for when the piece of work is due to start and finish.
- Divide the whole process of work to be undertaken into the following sections: preparation and support, interviews, analysis, and report writing.
- Ask the group to imagine themselves forward to the report-writing stage. Ask them to think of the last activity that needs to be undertaken to meet the final deadline. Write this activity on a Post-it and stick it at the end of the timeline.
- Stay with the report-writing stage and consider what activities need to have occurred in order for the final activity to happen on time. Estimate how long it will take to achieve. Write the activity and the time it will take on a Post-it and stick it in the relevant place upon the timeline.
- Continue this process of working backwards through all the stages until the group reaches the first activity.
- Once the line is complete, check it over for busy and quiet periods. Specifically ask the group to look for periods of time where there seem to be too many activities or not enough activities. Either reschedule some activities within the scope of team capacity and deadlines or brainstorm for how the team will manage these periods. Move the Post-its accordingly.
- Now check for missing activities. If there are a number of large activities e.g. undertaking individual or group interviews, break them down into their task components.

Variations and developments
- If there are many people involved, once the activities have been scheduled, the group can allocate someone to be responsible for the implementation of individual activities or stages of the work process.
- If the team input is divided according to work stages, it is better to construct a timeline by splitting the group into smaller groups based upon their input to the process – e.g. researchers to plan the interview section, editors and fundraisers to plan the report writing etc.
**CAE MAWR**

**Content**

The group created a timetable of all the activities that were already scheduled or happening. The activities had been prioritised after using ‘Personal, social, structural’ (Tool 16) as a planning tool. Activities could clearly be scheduled for six months. By using this tool it was possible to see visually where there was a break in activities, providing a good time to review progress and plan for the next six months.

**Process**

This worked really well. It is hard to keep people focused upon the task of timetabling, particularly if there are unresolved issues about certain projects, so this requires careful facilitation and time. The group decided to schedule large activities that were already planned such as conferences, piloting some training and creating a new constitution. Small activities such as phone calls were recorded on a separate sheet of paper, creating a ‘to do’ list. The timetable created was stuck on the wall so it could be an active record of activity over the following six months. The ‘to do’ list was stuck next to it so that all members of the group could see what needed to be done and by whom.
4.8 Tool 8: OK not OK

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<th>Stage 1</th>
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<tr>
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<td>Timeline</td>
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<tbody>
<tr>
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<td>Analysis</td>
<td>Reflection and evaluation</td>
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**Purpose**

- To explore people’s perceptions of poverty and their coping strategies. ‘OK not OK’ is an open way of tackling poverty issues rather than referring directly to poverty and wealth.

- To explore who are the most marginalised people within a community and what issues they may be facing.

- As a training tool, to familiarise the team with issues that are likely to arise during the PA and to plan for themes that may come up during interviews.

- As an information finding and analysis tool, to explore what it means to be ‘OK or not OK’ in a community so that action to tackle issues can be prioritised.

**Facilitation Tips**

- Use with individuals or a group. Split groups into different groups for men and women.

- This tool is a very ‘light’ exercise, but can explore personal issues. If it is being used for this purpose, take steps to ensure emotional safety.

**Materials**

Flipchart paper, pens, dots and Post-it notes
Method

- Prepare a piece of flip chart paper with an ‘OK not OK’ line as shown in the diagram below.

- Ask participants to describe what it is to be ‘OK’ and what it is to be ‘Not OK’; giving general comments rather than from personal experience. (For example, people who are ‘OK’ have good support networks. Those who are ‘Not OK’ are seen as being isolated. See diagram for example).

- These are written on Post-its and stuck at the relevant end of the line.
Each participant then thinks about where they would place themselves on a sliding scale of ‘OK’ and ‘Not OK’ and puts a sticky dot on the line where they think they would be placed.

Participants write on a Post-it why they place themselves there.

On a separate Post-it, ask them to write what they might need to move along the line towards ‘OK’.

These Post-its are then stuck next to each person’s dot.

Facilitate a discussion asking: Where would you place most of the people in this community on this line? Do men and women have the different ideas about what it is to be ‘OK’? What are the component parts of being OK for each sex? Are more women than men OK or the reverse? (invite participants to indicate this with a different coloured sticky dot). Are there any people in this community at the ‘Not OK’ end of the line? What percentage of the community is that? Why do you place them there? Are there any people in this community at the ‘OK’ end of the line? What percentage of the community? Why do you place them there? What could help move people along the line towards ‘OK’?

**Variations and developments**

- Use with individuals using an A3 sheet of paper for each interview.
- Use in informal situations, with passers by, in small groups or individuals.
- Use to look at personal issues by asking people to describe their own situation, the situation of other people, or hypothetical people, but be clear exactly what situation you are asking people to work on.
- The basic concept of a ranking line can be used for many things, such as exploring likes/dislikes, good/bad. See example from Gellideg below.
- This is also useful as an evaluation tool. Ask participants to place their ‘marks’ on a happy/sad line, or a good/bad one, or it was OK/it wasn’t OK. If time, ask them to explain why, or put comments on Post-its if not. You could also ask people to place themselves on a line on the floor rather than draw on a chart. This is more active and often a good way to finish a workshop session. You can ask participants to talk to the person next to them on the line about why they have placed themselves there, and so the process can lead into a good discussion about what could be done better next time.
INDIVIDUAL INTERVIEWS IN GELLIDEG

This tool was used to establish where people felt that they were in terms of wealth. Conversations focused upon how they felt they could progress up the line. The same exercise was done using what they regarded as an ideal wage, where they felt they were on the line and again what would move them up to their ideal income. Many of the barriers to achieving this became apparent through using this exercise.

CAE MAWR

Content

The group made two ‘OK not OK lines’ – one for men and one for women. For a woman the main issue about being ‘OK or not OK’ was associated with being liked and disliked: confidence was a key indicator of being ‘OK’. Another key issue was support: ‘You need the support of people around you’.

For men (as identified by women) to be ‘OK’ was to have paid work and a woman (to cook and clean). ‘Not OK’ was identified as: ‘not being heard in a woman-driven community.

When we compared the ‘OK not OK’ line for men and women, many things identified to make a man ‘OK’ conflicted with what makes a woman ‘OK’. However, this exercise reveals what to plan for when challenging stereotypes and looking for solutions to the barriers.

Process

The group found ‘OK not OK’ hard to get into because the question was too open, with few distinctions between what it meant for themselves to be ‘OK’ and ‘not OK’, and for their neighbourhood or the world.

It works well separating ‘OK and not OK’ for men and women, as differences of lifestyles, aspirations, roles become apparent and reveals sources of possible tensions within relationships and families.
4.9 Tool 9: Problem wall and solution tree

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**Purpose**

- To open up conversation about participants' opinions.
- To offer a snapshot of how people view their lives in terms of the barriers they face and the solutions they identify.
- As a planning tool, to identify barriers and solutions to aid prioritising action.

**Facilitation Tips**

- This tool is very brief and only scratches the surface of issues. There is a more in-depth tool that can be used described in variations below. Do not use it alone as it will not provide any depth of information about the reasons people think certain issues are a priority or how they work out what is a barrier or solution.
- Use as a good introductory tool to exploring personal issues.
- Always look at problems before looking at the solutions.

**Materials**

A4 paper, pen and Post-its.

**Method**

- Create a problem wall as shown in diagram below.
- Ask the interviewee what difficulties they face in day-to-day life. If this is too open, prompt them by asking what annoys them in their community, day-to-day life etc.
- As the interviewee starts to talk about the different problems they face, these can be written on Post-its and stuck on a brick on the wall.
If problems are related put the Post-its next to each other.

Once the wall has been built, take another piece of paper and draw branches coming out from a central trunk of the tree as shown in the diagram below.

Put the wall to one side and ask the interviewee what would make things better in the area they live in using a service etc.

As the interviewee talks, note all the solutions they mention and stick them on the branches to make ‘leaves’. If a number of solutions are mentioned clump similar solutions together at the end of one ‘branch’.
Variations

To take the analysis much deeper, try the following:

- Take a problem from the wall, or a cluster of problems, and start a new analysis. This can be done on flip chart paper, or with cards on the wall or floor.
  - Delve a little deeper into the problem using the question ‘Why?’ There may be one or more answers.
  - Write these down on the chart or cards, linked to the initial problem by a line (see diagram on p62).
  - Then go through each of those answers and delve a little deeper – again using ‘Why?’ This builds up a branched analysis of the problem and takes the analysis from the superficial towards the underlying causes.
  - At each stage, be sure to ask: Is this the same for men and for women?
  - Once you have reached the end of this process and have identified underlying issues, start to address these with solutions.
  - Start from the tips of the branches and work back to the original identified problem. At each stage ask – if we did this, would it solve this problem and would it have an impact on the next issue up the chain? This is a really powerful way of thinking through and prioritising solutions.
  - For example, say the issue is crime. The diagram illustrates some of the problems that might emerge and how they might be broken down by asking ‘Why?’ Once the problems have been broken down, the group can begin to work back to look at solutions (along dotted lines). For example, would the problem of ‘too many people hanging around the streets’ be solved by the young people having somewhere to call their own? A hut? A shelter? An unused building that could be renovated at low cost with community help? The issues of fear and lack of respect between old and young might be solved by a community activity to build bridges between the two groups. Ensure that you look at men’s and women’s issues separately.
  - Recording this sequencing helps the implementing team to explain why, in a crime reduction project, they are proposing things like increased youth provision on the estate, which might not at first seem directly connected.
CAE MAWR
Problem wall
Problems mentioned were: ‘being a seaside town having seasonal employment with communities in the background’, ‘domestic violence’, ‘lack of confidence’, ‘disinterest in the community’, ‘community projects being run by outsiders’, ‘the impact of tourism’, ‘lack of confidence’ (for women), and ‘Community First giving money by ward areas that do not relate to neighbourhoods’.

Solution tree
Solutions included ‘training the suits’—devising a course for decision-makers and local authority staff around values and attitudes; local service ‘one stop shop’, ‘involving men through physical work community projects’, ‘confidence-building courses for women with free crèche’, ‘lobbying decision-makers’, ‘inclusive community building’, ‘community owned crèche’ and ‘healthy living centre’.
4.10 Tool 10: Time trends analysis

**Purpose**
- To give people the opportunity to talk about their area/services history and the problems that it has encountered over the decades.
- To look at how the position of women and men in society has changed over time, and what that means for their life chances.
- To look at various aspects of community life, i.e., facilities, transport, housing, crime, safety, drugs, sports, health services, community spirit, and analyse how this has changed over time and might continue to change.

**Facilitation Tips**
- Use as a tool to open discussion about an individual's place within their community.
- Tends to be descriptive rather than analytical so use in conjunction with other methods that offer more detailed information.
- Works very well with established groups and older people.
- Use a curvy line as shown in the cartoon if the time trends are being described for historical perspective but use a straight line as shown in the diagram if the tool is going to be used to compare the past with the present and other forms of analysis.

**Materials**
Pen and flip chart paper.

**Method 1 Simple history line**
- Draw a curvy line on a large piece of paper and stick it on the wall. This line is a timeline.
- Ask participants/interviewees what is the first major event they can remember in the area. Find out the date and write this and the event at the start of the timeline.

- Note how men and women recall different things because their lives are different.

- Facilitate a conversation about the history of the area/service ensuring that all participants are contributing. As people talk, note their conversation on the paper, ensuring that the right event is recorded at the right time in history, and whether the person is a man or a woman, old or young etc.

- As you go on, encourage men/women/kids etc to evaluate and discuss events as a group (eg could be ‘Factory opened – but women not allowed to do paid work after marriage’) and explain why it was important to them. That way both sexes get to understand the perceptions of the other.

- Or you could divide the participants up into a group of men and a group of women, and come back to compare their results and discuss in plenary later.

- Work through people’s memory of events until the present is reached. Write the date at the end of the timeline.

- Give brief feedback to participants from the earliest date remembered to the present day. Probe to see if there is anything that needs to be added.

- Ask about and discuss this history; is there a pattern to these events? Were there key events? Who did they affect most? What was the position of women at the time? How did they survive? Did they marry? Who supported whom financially? What was happening in the world outside that had a big impact on the community?
Method 2 Trend analysis

- Draw a straight line on a large piece of paper. You might need to tape two or three bits of flipchart paper together to get a long piece. See diagram example below.

- Develop the timeline as in Method 1, asking for specific events and placing them on the timeline in the appropriate place.

- Then ask participants questions about life in that community. This can be done with individuals as well as groups. When was the best time to live in the community? When was the worst? Start with open questions like this, and then focus on specific issues of interest – crime, services, employment, and so on.

- There are a number of ways of recording these answers:
  - Draw a mood line over the timeline – a line that peaks when things were good/high and dips when things were at their worst.
  - Use beans or sticks to indicate good and bad times. Agree a system first – say five beans for good and one for bad, and ask people to place their score along the line. This is a flexible system and allows for discussion and changes before group consensus.

- Ask the group to project the lines into the future. Add future events that are known about; extend the mood lines or bean/analysis to this time. Explore people’s perceptions on the impact of those events.

![Diagram example of a trend analysis](image-url)
Variations and developments

- Rather than write events, draw them. If a facilitator is confident at drawing/knows graphic facilitation, or the group themselves are keen, drawing events can help people to remember things more easily and brings their experiences to life.

- Get single sex groups to plot a line each, and then look at the differences and similarities.

- Some groups like to keep this record. If so, to ensure the group and the facilitator has a record of the time trends, take a photo of the finished timeline and give the original to the group.

- Use to look at how a group has progressed and what they would like to happen next.

- This also works well as an evaluation tool, especially looking back over a process that has taken some weeks or months. Using Method 2, develop the timeline of the process, mapping on to it key activities and events. Ask people to draw their own mood lines, or to score good times/bad times with beans, etc. Participants could draw their own personal lines, and indicate on them when things worked well or didn’t. These can be shared with the group to generate a wider discussion about the whole process.
4.11 Tool 11: Mobility mapping

<table>
<thead>
<tr>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>To explore the day-to-day activities that occupy a person or household through their daily lives, in an average week.</td>
</tr>
<tr>
<td>To explore the logistical problems people face in managing their lives – mainly transport and service provision.</td>
</tr>
<tr>
<td>To explore preferences in transport (by bus, foot, car, etc) or services (shop, health, etc) and what determines those (money, safety, etc).</td>
</tr>
<tr>
<td>To find gender differences in mobility – who can move around most or least?</td>
</tr>
</tbody>
</table>
Facilitation Tips

- Best used with an individual or household. Difficult to manage with a group.
- Ensure that you collect data from a range of people and ask questions such as: ‘Would that be different for a man/woman? young/older person?’ and so on.
- Record all information by gender, age, and identity.

Materials

Flip chart, pens, Post-its

Method

- Choose an issue; eg where do you go for shopping/recreation/health?
- Start with a circle in the centre of the page, which represents where the participant lives.

![Diagram showing a circle with arrows to various locations]
TOOL 11: MOBILITY MAPPING

We focused upon health services because it was something all participants had in common. Participants defined health services in a very open way. For example, people included chemists and health food shops, leisure activities where they undertook exercise etc. Participants also suggested that power relations could be incorporated into the tool through drawing different sized circles to show the power each service held over their lives.

What people really liked about this exercise was that it enabled the person being interviewed to have some power in how their words were being recorded. Participants also liked have a visual interview because they felt it removed some of the intensity and formality of other interviewing techniques.

In a training setting, people used this tool in groups of three and each person had a taster of being interviewed, being interviewer and observing the process. The observer’s role was to look for what questions worked to open up conversation, and which questions stopped the flow of the interview.

- Ask them to draw lines and arrows from there, in the direction of where they go to get particular services; the length of the line indicates how far, the thickness how often.

- Ask questions such as: How do you get there? Why do you go there? How long does it take? Are you happy with this or could it be better?

- Jot down responses to these questions on Post-its and stick them on the relevant lines on the diagram.

**PORT TALBOT**

**Content**

We focused upon health services because it was something all participants had in common. Participants defined health services in a very open way. For example, people included chemists and health food shops, leisure activities where they undertook exercise etc. Participants also suggested that power relations could be incorporated into the tool through drawing different sized circles to show the power each service held over their lives.

**Process**

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In a training setting, people used this tool in groups of three and each person had a taster of being interviewed, being interviewer and observing the process. The observer’s role was to look for what questions worked to open up conversation, and which questions stopped the flow of the interview.
4.12 Tool 12: Managing wheel

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 4</th>
<th>Stage 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defining aims</td>
<td>Timeline</td>
<td>Verification and action planning</td>
</tr>
<tr>
<td>Stage 2</td>
<td>Stage 5</td>
<td>Stage 8</td>
</tr>
<tr>
<td>Raising awareness</td>
<td>Finding out</td>
<td>Reporting and moving forward</td>
</tr>
<tr>
<td>Stage 3</td>
<td>Stage 6</td>
<td>Stage 9</td>
</tr>
<tr>
<td>Planning/ training</td>
<td>Analysis</td>
<td>Reflection and evaluation</td>
</tr>
</tbody>
</table>

**Purpose**

- To determine how people manage their income on a weekly or monthly basis.
- To explore coping strategies at a household level, which would include unpaid help and assistance.

**Facilitation tips**

- Use with different people to explore different strategies.
- Use with individuals or at household level. It does not work in groups or at community meetings because it is personal.
- Stress that this is confidential information, and that it is not necessary for people to share details and sources of their income. What is important is how they manage to juggle the resources they have.
**Materials**

Flipcharts and four different coloured pens (or Post-it notes). Dried beans if you want to explore ratios of expenditure (see variations below).

**Method**

- Prepare a circle divided into seven segments as shown in the diagram.
- Ask on which days they get their income, or help from others. When do they get the most amount of money and when do they get the least? Note this in the relevant segments in one colour of pen.
- You can ask and note on the relevant segments where that income comes from, but be aware of sensitivities and don’t probe too deeply.
- Add in favours and help they get from other people that is not paid but makes a difference to whether they can manage or not.
Using a different coloured pen to record the information in the relevant segment of the circle, ask which day has the biggest expenditure, and what the biggest expenditures are? Use ‘a lot’, ‘medium’, or ‘a little’ as an indication of size rather than specific amounts.

Using a third coloured pen to record the response, ask if there is money left at the end of the week, what do/ would they do with it?

Using the remaining colour pen to record the answer, ask if there are shortfalls, how do they cope?

**Variations and developments**

At household level it can facilitate discussion about roles, responsibilities and time, especially with respect to men and women’s different ways of managing money and unpaid help.

Explore the ratio of expenditure from the biggest outlay, to the smallest. Use a pile of dried beans and ask the interviewee to divide them into proportional piles and put them onto the relevant segment.
4.13 Tool 13: Spider diagrams

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 2</th>
<th>Stage 3</th>
<th>Stage 4</th>
<th>Stage 5</th>
<th>Stage 6</th>
<th>Stage 7</th>
<th>Stage 8</th>
<th>Stage 9</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defining aims</td>
<td>Raising awareness</td>
<td>Planning/ training</td>
<td>Timeline</td>
<td>Finding out</td>
<td>Analysis</td>
<td>Verification and action planning</td>
<td>Reporting and moving forward</td>
<td>Reflection and evaluation</td>
</tr>
</tbody>
</table>

### Purpose
- To explore people’s thoughts on an issue, for example training, education and employment.
- To discover the benefits, barriers and potential ways of taking up opportunities.

### Facilitation tips
- A flexible tool to use with individuals, small and large groups.
- Use for all planning stages, analysis and exploring issues in interviews.

### Materials
Flipcharts, pens and Post-its. Sticky dots if you want to rank or categorise the different issues raised (see variations below).

### Method
- In the centre of the paper draw a circle about 30 - 40cm in diameter. Inside the circle write the issue that is to be explored.
- As ideas are identified, draw a line from the circle’s edge outwards across the piece of paper. Over the top of the line write the idea that is being talked about. Each point must have its own line. See diagram.
- As each idea or issue is raised, probe further, asking how, why or who the issue affects.
- Probing will either raise sub-issues or new issues. Note sub-issues by lines branching out from the original issue. New issues should be recorded through drawing a new line from the centre circle.
- After the exercise either take feedback from groups about main opportunities and issues prioritised, or if in individual interview, compile the information from interviews together.
Variations

- If you want to prioritise the issues, when the exercise is finished ask the interviewee/group to identify the most important ones and place a sticky dot on each.

- To explore gender and other identity difference, use with tool with different groups to understand different perspectives. Bring the analyses together and compare – what is similar and what is different? Explore why. This is most effectively done with the different groups together.

- As with Time trends analysis (Tool 10), where you suspect different perceptions/opinions between men and women/old and young etc, proactively probe them and discuss them. Give women and men different coloured sticky dots to illustrate how issues vary in importance to men or women.
4.14 Tool 14: Interview recording sheet

Purpose

- To ensure a standard format for recording basic details of interviewees.
- To ensure that the discussion/conversation is captured, not just the diagram.

Facilitation Tips

- This tool generates cover sheets for attaching to flipcharts and notes from individual interviews. It enables comparisons and analysis on basis of age, gender, employment status etc.

- Undertake this documentation immediately after the interview while the information is still fresh.

- Always keep back-up copies of the interview recording sheets of all interviews in a separate place. This will ensure information is not misplaced.

- It is often useful to produce a standard ‘form’ for these sheets so that the same information is always recorded.

- After each interview or discussion, the interview recording sheets note not only who participated, but also highlight the main issues they raised. The team need to think about those issues – do they contradict information gathered in other interviews, or do they confirm it? Do they raise new issues that need to be explored further? What new questions do they raise? Do we really need to answer those and if so how can we answer them?

Materials

An interview recording sheet (see example below)

A4 paper and pen
Method

- Record the following on a sheet of paper: Date, time and location of the interview, age group and gender of interviewees. You might like to use a map to record geographical spread of interviewees.

- Summarise the major issues that were raised during the exercise, and who raised them. Note any particular gender issues and record any new questions that the exercise might have raised or any major contradictions with information gathered in other exercises.

- Note anything useful about the process – how did the interview go?, were there any problems, such as participants reluctant to talk about certain issues, difficulties with tools, etc?

- Use this reflection to help plan future exercises. Should you adapt the tool a little? Is it time to explore the issue in a different way? and so on.

- Attach the interview recording sheet to the diagrams and notes from the interview/exercise.

Variations and developments

Depending on what your information needs are, you can note additional information such as:

- Whether the interview was with an individual or group.

- Work status (employed/ unemployed/ retired/ unpaid work, full-time/part-time, occupation), training.

- Specific factors leading to marginalisation (lone parent, unemployed, sickness benefit, ethnic origin, unskilled, substance misuse, disability, sexual preference, caring responsibilities).

Interview recording sheet

This is an example of the kind of data collection used during a participatory gender needs assessment. It is a simple recording mechanism to collect information from individuals. It was used by the Gellideg Foundation Group workers to summarise information from individual or group interviews with men and women from the estate, accompanied with the use of participatory tools to encourage discussion.

The Gellideg workers filled in the sheets as soon as possible after the interviews so they wouldn’t forget what was said, and gave their own sense of the interview and the ways in which that person or people coped (under ‘barriers’ and ‘analysis’ sections).
When data from all the sheets was collected, it was possible to analyse the information by gender and age to build up a picture of how women and men managed their lives, family responsibilities and resources differently. See Tool 16: Personal, Social, Structural as an example of some of the data analysis that can be achieved using a recording sheet like this one.

**EXAMPLE OF AN INTERVIEW RECORDING SHEET FROM GELLIDEG**

<table>
<thead>
<tr>
<th>Date ..........</th>
<th>Time ..........</th>
<th>Location ..........</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male/ Female</td>
<td>Single/ Married/ Live-in partner</td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td>16-25</td>
<td>25-50</td>
</tr>
<tr>
<td>Individual/group</td>
<td>Male/ Female/ Mixed</td>
<td></td>
</tr>
<tr>
<td>Number of people....</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed/ Unemployed</td>
<td>Full-time/ Part-time</td>
<td></td>
</tr>
<tr>
<td>Occupation.....</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any training undertaken............</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Children......</td>
<td>Age............</td>
<td></td>
</tr>
<tr>
<td>Any other dependants............</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anything further (able/disabled, living with parents etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notes about the process (eg literacy issues, men not talking)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barriers to getting on</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Analysis (a sheet of A4 will be needed for this)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4.15 Tool 15: Gender and age matrix

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 4</th>
<th>Stage 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defining aims</td>
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<td>Verification and action planning</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 2</th>
<th>Stage 5</th>
<th>Stage 8</th>
</tr>
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<tbody>
<tr>
<td>Raising awareness</td>
<td>Finding out</td>
<td>Reporting and moving forward</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 3</th>
<th>Stage 6</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Planning/ training</td>
<td>Analysis</td>
<td>Reflection and evaluation</td>
</tr>
</tbody>
</table>

**Purpose**

- To facilitate the first stage of analysis of the information gathered. To take account of, and make explicit, the differences in perspectives between men and women and between different age groups.

- This is a key exercise in the process of a gendered PA.

**Facilitation Tips**

- Ensure the age groups are not too wide or too narrow.

- If you are starting the analysis of the entire PA you will need lots of wall space to do this work. It is often best to use one matrix for men and a different matrix for women to start the analysis process.

- Be aware of rumour and opinion and mark these out with different coloured Post-its.

**Materials**

- Flip chart, pens, interview recording sheets.
Method

- Decide what age categories are most useful for your purposes, or use basic ones of under 16, 16 to 25, 25 to 50 and 50+
- Reproduce the matrix onto pieces of flipchart paper, one for men and one for women.
- Using the information on the interview recording sheets, begin to identify the issues that emerged for men and for women.
- Using a separate Post-it for each point, write the issue on the Post-it and stick the Post-it in the right box on the matrix, according to age and sex.
- Cluster issues together as they begin to emerge – for example, around benefits, employment, education and training, services, the community, personal issues, crime, debt, etc.
- Once all the information has been collated, it will be possible to start making comparisons between the different sexes and ages.

Variations and developments

- Include other diversity criteria, such as disability or black and ethnic group.
4.16 Tool 16: Personal, social, structural

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 4</th>
<th>Stage 7</th>
</tr>
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<tbody>
<tr>
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<td>Stage 2</td>
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<tr>
<td>Stage 3</td>
<td>Stage 6</td>
<td>Stage 9</td>
</tr>
<tr>
<td>Planning/ training</td>
<td>Analysis</td>
<td>Reflection and evaluation</td>
</tr>
</tbody>
</table>

**Purpose**

- To analyse the barriers and opportunities faced by people interviewed.
- To examine the relationship between personal, social and structural levels (see box below).
- To bring out the similarities and differences between what men and women think and do, by including private as well as the public arenas.
- To discover what action can be taken by different people to alleviate barriers and take opportunities.
- To enable targeted strategies to be developed that are relevant and of benefit to men and women.
- To identify where the power to make changes lies.

**Personal** Forces that people have some control over, such as their training and education, their health, their confidence levels and feelings about themselves and others.

**Social** The ideas and beliefs that divide people from each other or bring them together. For example, what people outside an estate or community think of that community, the expectations people have about what women and men do and should be doing.

**Structural** Forces that people have little control over. For example, the job market, the benefits system, council and voluntary sector services. Structural barriers are difficult for communities to tackle because they concern economics, policy, regional and national government.
Facilitation tips

- Don’t use different coloured Post-its for the three categories because as the tool progresses you may want to move issues to a different level.

- If the team undertaking the analysis wants to express its interpretation of an interview it should use a different coloured Post-it/paper to ensure that the team analysis does not get muddled up with the opinions and facts from the interviews.

- Be careful permanently moving Post-its because once they have been moved, the original interview script is gone.

Materials

Two colours of Post-it notes, pens.

Tape pieces of flipchart together to produce a giant sheet of paper and draw on that the following matrix (see below).

<table>
<thead>
<tr>
<th>Personal</th>
<th>Social</th>
<th>Structural</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barriers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Method

The matrix below analyses the issue of training from the perspective of men aged 50 plus and the barriers and opportunities they face at a personal, social and structural level.

- Go through the interviews and where a barrier or opportunity relating to one of the levels is mentioned, make a note of the issues on a Post-it and stick it onto the matrix.

- Only use one Post-it per issue or point.

- As the information from different interviews builds up, similar points will be raised. Put similar issues together so clusters are gradually developed.

- As clusters get larger look for patterns and over-arching themes.

- Once all the interviews have been analysed, examine the matrix to see if men and women identify different barriers and opportunities.
Use the information for action planning and targeting services.

<table>
<thead>
<tr>
<th>Men: 50+</th>
<th>Personal</th>
<th>Social</th>
<th>Structural</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Personal and household level</td>
<td>Community level - extended family, neighbours, estate</td>
<td>System level - government, local government</td>
</tr>
</tbody>
</table>

**Barriers**
- Cannot see long-term benefit of taking up training as need short-term money to survive.
- Lack of confidence.
- Never been involved in the community.
- Nowhere to go to socialise.
- Even if trained, won’t take on due to age, lack of experience.
- Many people did not learn to read and write in their youth.
- Even if you do have a job - have to pay bills straight away.
- High council tax in Merthyr Tydfil, but not put to good use.
- Employers happy to keep people ‘on fiddle’ as cheap for them.

**Opportunities**
- Lived in community over 40 years.
- Car owner.
- Gellideg produces excellent football teams.
- Council tax and rent are reduced for OAPs.

**Variations and developments**
- This could be adapted to include other diversities coded through different coloured Post-its.
- Solutions and suggestions can be captured separately under age and gender.
- This tool could also be used to look at impact, as this example from Gellideg shows.
**CAE MAWR**

**Content**

Personal issues that emerged were: confidence levels, depression, courses for women. Social issues were: anti-social behaviour, drug use and crime, domestic violence, community youth café (mediation?), domestic violence services for men, physical work project, benefits advice, childcare services that are accessible to men. Structural issues were: employment, form filling, bureaucracy, advocacy at workshops, communication with local authorities, ‘training the suits’.

After prioritising problems to tackle and identifying opportunities, the following priorities emerged:

1) Courses for women, courses for ‘suits’, lobbying via conferences, benefits advice.
2) Community premises, visit other community groups, find out about co-operative crèches.
3) Long term – one-stop shop and projects to engage men.

**Process**

We took Post-its from the problem wall and solution tree and decided whether they were at a personal, social or structural level. We found that the three levels merged together. Structural changes occurred/were experienced at social level, events and services at social level impacted on the personal. What mattered was keeping the same issue (eg childcare) whether social or structural, in the same level. It was hard to be clear about how to allocate personal and social issues, whereas the structural issues were clear.

All problems were allocated into the barriers row and all solutions were allocated into the opportunities row.

Once we had looked at all the solutions, we used different coloured pens to dot:

1. Ones already undertaken.
2. Action the group really wanted to take next.
3. Long term goals/ things that should happen next.

These were then put into a timetable of action.
4.17 Tool 17: Fact, opinion and rumour

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 4</th>
<th>Stage 7</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
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<td>Reflection and evaluation</td>
</tr>
</tbody>
</table>

**Purpose**

- To have awareness of the assumptions and common attitudes that shape what men and women do and are expected to do.

- To distinguish facts from rumour and opinion in order to ensure that action resulting from the PA process deals with relevant issues.

- To build awareness that what people identify as fact is often rumour.
Facilitation Tips

- Fact is often not straightforward – people often hold their opinions to be ‘facts’.
- Decide carefully on how you are distinguishing fact and opinion before starting to use this tool.

Materials

Post-it notes and three large sheets of flipchart paper, with separate titles of ‘fact’ ‘opinion’ and ‘rumour’.

Method

- Go through each interview in turn classifying relevant information into fact, opinion, or rumour. ‘Fact’ refers to straightforward issues that generally cannot be disputed, for example, the cost of transport, or local training opportunities. ‘Opinion’ is what people think is true, but can be debated, for example ‘the dole pays young women to have babies’. Rumour is what people have heard, but is not attributable to anyone, or substantiated for example, ‘those people are getting lots of money from Europe to buy the club’.

- Using one Post-it per issue, make a note of the facts, opinions, and rumours interviewees have mentioned. Stick each point onto the relevant piece of flip chart paper. As more Post-its are generated, start to group them together into clusters.

- Once all of the interviews have been scrutinised, check the clusters for overall themes.

Variations and developments

The opinions and rumours sections can be used to look at community alliances and differences.
4.18 Tool 18: Action planning matrix

<table>
<thead>
<tr>
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<tbody>
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<td>Reflection and evaluation</td>
</tr>
</tbody>
</table>

**Purpose**
- To develop and prioritise solutions and actions to be undertaken.
- To discover what action can be taken by different people to alleviate the barriers and take the opportunities.
- To enable targeted strategies to be developed that are relevant and of benefit to men and women.

**Facilitation tips**
- These matrices can be used in a small group or in an informal way with a large group.
- To continue to explore difference between groups – age, gender, other identities – either use colour coded Post-it notes, sticky dots, or work in small groups with people of the same identity.

**Materials**
Different coloured Post-it notes, pens. Pieces of flip chart paper taped together to provide a giant sheet of paper.

**Method**
- There are a number of new matrices that you could use to help with action planning; three really popular ones are given opposite. However, you could design your own, or use a combination of those given here.
- Having chosen which matrix you will use, reproduce it on a large piece of paper and put on the wall, table or floor.
Exploring the solutions suggested and actions proposed, put each onto a Post-it note and place within the matrix in the appropriate box. Sometimes it will be very clear where an idea should go – other times it will not. The discussion that unfolds in trying to place the idea in the matrix is essential in teasing out some of the wider issues.

When looking at criteria such as impact, ask whom the impact is for? Young, old, men, women and so on. Challenge assumptions about these; if you think it will benefit young people then check that with them.

Explore ‘us’ as well! Who within the community will this mean? Again, challenge assumptions about this.

<table>
<thead>
<tr>
<th>Low impact</th>
<th>Medium impact</th>
<th>High impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Easy</td>
<td>Medium</td>
<td>Difficult</td>
</tr>
<tr>
<td>Short term</td>
<td>Medium term</td>
<td>Long term</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>By us (we can do ourselves)</th>
<th>With us (we can work with others to do)</th>
<th>For us (others need to do for us)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Structural</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Or

- Exploring the solutions suggested and actions proposed, put each onto a Post-it note and place within the matrix in the appropriate box. Sometimes it will be very clear where an idea should go – other times it will not. The discussion that unfolds in trying to place the idea in the matrix is essential in teasing out some of the wider issues.

- When looking at criteria such as impact, ask whom the impact is for? Young, old, men, women and so on. Challenge assumptions about these; if you think it will benefit young people then check that with them.

- Explore ‘us’ as well! Who within the community will this mean? Again, challenge assumptions about this.
Variations and developments

- Using a range of matrices will help identify different levels of action required – easy to hard, short to long term, what can be done easily within the community itself, what will take longer and need more resources. If you sequence the way you use the matrices, it will help prioritise and then action plan. For example use the Personal, Social, Structural and By us, with us, for us matrix to help identify what you want to do; then take each column and put through a low/medium/high impact and easy/medium/difficult matrix to help prioritise and plan.

- The matrix can be used in many different ways; here is an example from Gellideg when they looked at what men and women needed and what they could do.

<table>
<thead>
<tr>
<th></th>
<th>By us (we can do ourselves)</th>
<th>With us (we can work with others to do)</th>
<th>For us (others need to do for us)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Build on own qualifications and skills. (Men want short practical courses, women want to move up job market)</td>
<td>Use strong family connections to improve life chances</td>
<td>Provide more services on the estate</td>
<td></td>
</tr>
<tr>
<td><strong>Social</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide mutual support to each other and avoid cliques</td>
<td>Organise community to remove graffiti and paint murals in public places</td>
<td>Officials improve their attitude to people on the estate – remove stigma, for men, of being on benefits, for women, feeling that social standing is small</td>
<td></td>
</tr>
<tr>
<td><strong>Structural</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Women can find employment around school hours</td>
<td>Set up a creche on the estate</td>
<td>Job market changes to enable them to provide long term job security for the family</td>
<td></td>
</tr>
</tbody>
</table>
4.19 Tool 19: Body, hearts and minds

<table>
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</tr>
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</table>

Purpose

- To capture a range of participants’ reflections on a process – the categories prompt people to think about different criteria.

Facilitation tips

- Can be used with large or small groups.
- It is best to do this so that all participants can see what has been said, but it can also be done as people are leaving at the end, (a ‘post and run’ exercise), so that only the facilitators get to view it.
- Needs to be made very visual.
- Can do separate diagrams for different gender groups, or use different Post-it colours for different groups.

Materials

- Flip chart, Post-it notes and pens

Method

- Draw a very large body (see diagram) on flip chart paper. You might need to tape a number of pieces together to get a large enough piece. Draw a bucket/basket in one hand, and a dustbin to one side of the body, and a large heart in the chest area.
- Ask the following questions:
  - What has been interesting or what have people learned? These comments go on the head.
  - What have people enjoyed? These comments go on the heart.
What have people found useful and will take away with them? These comments are for the bucket/basket (sometimes this is described as a toolbox).

What has not been useful or they have not liked? These comments are for the dustbin.

- Ask participants to spend five or ten minutes noting down on Post-its their answers to these four questions.
- Either ask individuals to come up and place their Post-its on the chart – talking through each; or ask the group to gather round and place their Post-its on at the same time. Allow time for everyone to read them.
- If time allows, facilitate a discussion around key or surprising issues raised. If you have distinguished between men’s and women’s comments (or any other groups) in some way – either with different coloured Post-its or different diagrams, then compare the two with the group.

Variations and developments

- Add a cloud or thought bubble over the head with a question mark. This is for unanswered questions or new questions that the session/process has raised.
- Vary the body shape, especially if you can relate it somehow to the group or the process. The figure can be male or female; the basket can be anything relevant; the figure can be decorated in some fashion.
Participation is a process.

That gender is about men and women.

Food was great.

I enjoyed feeling safe and listening to others.

I felt bold enough to talk about issues.

New contacts.

Listening skills.

Consultation is the same as participation.

Session 4 was too long.
4.20 Tool 20: Evaluation wheel

<table>
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**Purpose**
- To evaluate achievement against an agreed set of criteria. These can be:
  - The objectives of the process.
  - Criteria generated through a group session, asking for indicators of success, for factors that would make up success.

**Facilitation tips**
- Can be used with large or small groups.
- It is best to do this so that all participants can see what has been said, but it can as people are leaving at the end, (a ‘post and run’ exercise), so that only the facilitators get to view it.
- It is very visual.
- Can do separate diagrams for different gender groups, or use different Post-it colours for different groups.
- You need to be clear whether the centre/wheel axle is the ‘target’ or the rim of the wheel.

**Materials**
Flip chart, Post-it notes and pens
Sticky dots would be useful
**Method**

- Agree the criteria to be used. Don’t have more than seven or eight otherwise the wheel becomes too crowded and it is difficult for people to put their scores on.

- Draw a large wheel, with as many spokes as there are criteria; write the criteria at the end of each spoke, clearly.

- Ask participants to place a mark or sticky dot along the spoke for each criterion; the position of the mark/dot reflects to what extent they think that criterion has been met.

- Ask for comments on Post-its if people would like to qualify their judgement in any way.

- Invite the group to view the wheel; comment on key strengths and weaknesses – which criteria are being met, which are not; are there any major contradictions?

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**Example Diagram**

- **Find out about peoples lives**
  - Include everyone - covering gender, age, identity
  - Very difficult to contact marginalised people. No points of access, few existing groups
  - Not estate wide time motivation
  - Few community wide discussions

- **People keen to talk re: lives**
  - Good interview skills

- **Understanding of men and women’s issues**
  - Have completed bid. It is gendered, identifying differences

- **Inform and develop Objective 1 bid**
  - Learn how to undertake PA
  - Would like to know more about how to use tools with groups
Variations and developments

- Prepare separate wheels for different groups and compare afterwards. Alternatively you could use different coloured dots to indicate different groups.

- Do these wheels on an individual basis, drawn on A4 sheets, so that you can gather more personal information.

- Do this physically. Mark the spokes on the floor and ask people to place themselves along each spoke in turn. Ask participants to talk to their neighbour on the line about why they have placed themselves there – this is an excellent way to generate discussion about issues.
4.21 Tool 21: Monitoring mountain

Purpose

- To monitor progress on the main aims of a process.
- To enable a more open monitoring process that allows participants to use their own criteria for making judgements of progress, and so gain an understanding of those criteria.

Facilitation tips

- Can be used with large or small groups.
- It is very visual.
- Can do separate diagrams for different gender groups, or use different Post-it colours for different groups.
- This is best used when there is time for people to explain why they have placed themselves where they have on the mountain.
- This can be very personal. Be prepared to support people in the group if they are finding it difficult.

Materials

Flip chart, Post-it notes and pens

Method

- Prepare a flipchart with the mountain diagram shown.
- Ask participants to draw themselves on the diagram. If the process under review was a journey up a mountain, where would they place themselves? Keep the question very open; allow people to interpret it in their own way.
- Ask participants one by one to draw themselves on the mountain and ask them to explain why they have drawn themselves in that way.
- Ensure that there is time for group discussion afterwards. If people have found this difficult in any way – perhaps because their experience was negative, be prepared to support them.

**Variations and developments**
- Do the mountain drawings on an individual basis, drawn on A4 sheets, so that you can gather more personal information.
- Do separate drawings for different groups.
- You could use different coloured pens to represent different groups.

Diagram reproduced from page 599 of the Oxfam Gender Training Manual (Suzanne Williams with Janet Seed and Adelina Mwau; Oxfam 1995)
5. LESSONS WE LEARNED

‘At first it was difficult to get people to believe that things could change [as a result of the gendered needs assessment]. But now people are starting to believe that something can be done.’

Collette, Coordinator of the Gellideg Foundation Group

Bringing gender and participatory methods together makes sense. Any community has many kinds of people within it, and an attempt to involve everyone must mean trying to reach and involve old, young, men, women, different ethnic groups, disabled as well as able-bodied. It must ensure that they can all take part in the process and the decisions that emerge from it.

These are some of the lessons learned from the different Welsh projects given as examples in this guide.

1. **Being a good interviewer** means listening carefully to the hidden as well as the obvious messages, for the feelings as well as the facts, for the qualitative and the subjective as well as the quantitative and objective. It is about valuing how people feel as well as what they think, and using this alongside the bald data. It requires working at grassroots level, enabling the participation of busy people with complicated lives and adapting your timetable to theirs.

2. **Raising complex issues** Analysing inequality (such as gender) will raise issues which are not necessarily revealed by participatory methods, such as who holds the power? Who has the resources? Who decides? Who benefits? Finding out what the real issues are takes time and imagination. It means acknowledging that community empowerment will alter the balance of power in the community. This will give some people more control over the allocation of resources (such as money and time) than they had before you started.

3. **Confidential issues** will come up in interviews which are personal and need to be treated with care. You may hear about problems (such as financial difficulties or domestic violence) that you need to keep confidential. A locally recruited development worker will know the importance of keeping such things to themselves. It is perfectly possible to draw the interview results together in a general way that identifies the issues collectively without mentioning names.

4. **Getting beyond the data** It is not that unusual to gather data by age and gender using participatory methods. However, looking at the data and analysing what women are doing, what men are doing, where their needs and roles are different and where the same, and what can be done to reflect those differences, is a second stage. This goes beyond data gathering, and is much more rare – and more valuable in finding solutions.
5. **Attitudes to data collection** Gendered participatory research means having the right attitude when collecting data. Like gender analysis, the key to success is not making assumptions, being aware of your own bias, respecting the perceptions and voices of others, ‘passing the stick’\(^1\), and being aware that the powerful people in a community shape reality in a way that may remain unquestioned.

6. **The importance of good documentation** Taking good notes, keeping your records organised as you go along, sorting and storing your interview sheets, flipcharts and notes you have used in training, is essential to a good analysis later. It is tempting not to bother when you are tired and need to start on something else – but the time spent on good documentation is worth its weight in gold.

7. **Comparing your data with known facts** where possible. This is a good way of checking for accuracy. For example, the solid statistics about men and women’s lives and work in Wales that was available through equal opportunities guidance for Objective 1 applications were helpful for comparison and checking back in the Gellideg study – and they proved to be very similar.

8. **The need for time** Gender-sensitive participatory assessment training takes time, especially in order to explore the layers of subtlety needed to enable gender differences (or other dimensions of inequality) to be brought out through participatory methods of collecting information.

9. **A mixture of tools and techniques** A gender-sensitive participatory assessment is achieved through a mixture of tools and techniques. These might include focus groups as well as street work, and more in-depth and analytical tools. Using different tools, at different events, with different people, enables a wider range of people to engage. There is a greater chance that they will find a way that suits them best. In addition, it allows the issues to be explored from many different perspectives and so promote wider and deeper understanding within the community.

10. **A good consultation process will include:**

   - Training local people and local community staff to be the implementing team. This keeps skills, experience and ownership of information at a local level.
   - Through careful participatory action planning, ensuring that community participation does not finish with the end of the consultation exercise.
   - Considering power relations at every stage. Who is asking whom to participate in what? Who decides what happens after the consultation?
   - Checking that people being asked to participate have all the information they need and want for full participation.
   - Using appropriate techniques to enable everyone to be involved.
   - Checking that you have you listened to everything, not just what you want to hear, or from people you have a particular rapport with.

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1. Where a stick or something similar is passed around, the person holding the stick has the right to speak and others must listen.
6. FURTHER READING AND SIGNPOSTS

**Engendering Change Training Pack**, Fran Loots and Jeanette Timmins. A training manual building the capacity of women in voluntary sector organisations to argue their case, get to know about local and national politics, build their confidence and take leadership. Developed in Scotland by Engender, a women’s networking and information organisation, 2002. www.engender.org.uk

**Gender and poverty**, Katherine Rake and Gemma Rosenblatt. Lays out the facts about why women are the majority of the poorest groups in society, and how the structures of economics and society keep them there. Fawcett Society, 2003.

**Gender proofing handbook**, Marie Crawley and Louise O’Meara. A simple, easy to follow toolkit produced by the Irish government. It shows how gender can be integrated into different types of projects, gives case study examples, definitions and statistics. May 2002. For copies email: equalityinfo@justice.ie

**Oxfam Gender Training Manual**, Suzanne Williams, with Janet Seed and Adelina Mwau. Based on Oxfam’s international experience, this manual is a comprehensive guide to the tools and frameworks for building women and men’s understanding of their roles and needs, and contains detailed case studies around international themes for gender equality, Oxfam, 1995.

Reaching the parts; Community mapping: working together to tackle social exclusion and food poverty, SUSTAIN, 2000. Describes the use of PA in food poverty projects in England. Good descriptions of different tools and how they were used.

Community-led Participatory Appraisal: Good practice from Wales. A detailed guide to planning and running PAs based on five pilot projects from across Wales. Available from Community First Support Network. Tel: 02920 556190 or www.communitiesfirst.info

Related resources from Oxfam

Oxfam has produced a series of resources designed to complement each other without repetition. The following reports and toolkits are available that offer more detailed information about issues raised within this guide.


Fifty voices are better than one: Combating social exclusion and gender stereotyping in Gellideg, in the South Wales Valleys, Gellideg Foundation Group and Oxfam GB, 2003. A report on the gendered needs assessment carried out by Gellideg Foundation Group, that led to the development of this guide. Outlines many of the gender issues raised through the assessment.

Have you been PA’ed? Using Participatory Appraisal to shape Local Services, East End Health Action, Greater Easterhouse Community Health Project, Greater Glasgow NHS Board, Oxfam GB, 2003. Based on an evaluation of the use of PA practice and how to ensure that PA achieves impact.

ReGender toolkit for grassroots women. Based on the experience of Oxfam’s work with three community level women’s groups, this toolkit leads women through awareness raising on gender issues in their community, how to pick an issue they are passionate about, how to carry out a gender audit, and how to lobby decision makers to use its results. Oxfam, forthcoming 2004.

Making Waves in Walsall: learning from the success of the participatory appraisal network. Based on an evaluation of Walsall PA network after its first five years, this report describes the impact that the network and widespread use of PA in Walsall has had. Oxfam 2003.

For an up to date list of available resources please go to the Oxfam website at www.oxfam.org.uk/resources/ukpoverty
EVALUATION

We would love to have your feedback and comments after using this guide.

Name

Address

Please tell us about your experience of using this guide to conduct a gendered PA – what worked and what didn’t?

Please detach and return form to: Programme Assistant, UK Poverty, Oxfam Cymru, Market Buildings, 5 – 7 St. Mary Street, Cardiff CF10 1AT
Are you working to improve things for women and men in your community? Or carrying out a participatory appraisal of an area's needs and requirements? Or undertaking a community-based consultation?

Then this is the guide that you need. Based on an actual gendered participatory appraisal in Wales, it offers a thorough explanation of why looking at men and women's different life experiences is an essential part of any participatory work.

It takes you through the stages of a process which is gendered throughout – in other words, which takes account of the different perspectives of women and men. It gives you a range of clearly explained tools. And it explains how to analyse and collate qualitative information with a gender perspective.

Participation is an ongoing process – get it right from the start and it can help shift power from the powerful to the powerless. This guide shows how to carry the process through from exercises to action: action that can lead to real and lasting changes in the lives of men and women.