



Mainstreaming a Gender Justice Approach

A Manual to support NGOs in self-assessing their gender mainstreaming competence

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Document GMLT Manual 12 Boxes tool

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Preface

In the spring of 2006 Oxfam Novib (ON) did an assessment of its work in the field of gender equality and gender mainstreaming.¹ It was then nine years since ON's last gender policy document "More power, less Poverty" had been published, and little by little the gender perspective had become less visible. As in many development organisations, it seemed that gender mainstreaming had become "gender-away-streaming". From 2000 onwards, a lack of focus, drive and expertise had steadily weakened a consistent gender justice approach. The assessment came with different recommendations. One of them was about developing a new Gender Justice policy, clarifying several key concepts related to gender justice.

ON's new Gender Justice Policy was developed in 2007. This policy mentions three main strategies that are to be implemented in combination with each other:

1. STOP gender-based violence, with an emphasis on Gender Justice as a stand alone issue, supporting women's rights organisations, and also organisations with programs specifically on violence against women.
2. The MAINSTREAMING of gender justice in counterpart organisations and their programs.²
3. The promotion of women's LEADERSHIP, also called transformative leadership, with an emphasis on inclusive (non-authoritarian, participatory and respectful) leadership styles and on connecting different organisations and movements.³

The Gender Mainstreaming and Leadership Trajectory (GMLT) is a learning trajectory for counterparts and Oxfam Novib, developed in the course of 2007 and 2008 and implemented from 2008 to 2010. It forms part of ON's gender mainstreaming strategy. Although ON knows that gender mainstreaming is not without risks, the organisation decided it is worthwhile to work for two and a half years, together with counterparts and consultants, to push for more effective and efficient gender mainstreaming. The GMLT's overall aim is to create evidence-based change towards more gender justice sensitivity and practice, at the level of counterparts, their programs, and the communities they work with, as well as in ON's regional bureaux. Such a trajectory was felt opportune because there still is no country in the world where men and women enjoy equal rights and opportunities. Moreover, women carry the major burden of poverty, not only in terms of income poverty; their responsibilities and duties are also increasing.

The GMLT builds on the lessons learned from the former "Gender Route Project" that ran

¹ Oxfam Novib's Organizational Assessment: Towards effective promotion of women's rights and gender equality. Ellen Sprenger, 2006.
² For a definition of Gender Mainstreaming, see paragraph 1.6 with the definitions of the main concepts used here.
³ See for example "Gender Justice: Empowerment and Inclusion. Aim 5 The Right to an Identity: Gender and Diversity". Oxfam Novib 2007, Policy paper by Jeanette Kloosterman.

from 1997 to 2000. Through this project Oxfam Novib supported selected⁴ counterparts all over the world in mainstreaming gender at the organisational level.⁵ The GMLT is different in the sense that it extends the gender mainstreaming to the program level. Moreover, there is an explicit focus on female leadership, as this appeared to have an important influence on the success of gender mainstreaming.⁶

The GMLT includes a number of steps. One of the first steps is making an organisational diagnostic to identify the degree of gender mainstreaming in the organisation and its programs. Experiences elsewhere show that a self-assessment is most effective when it is guided by an external facilitator. Such a guide ensures optimal participation and exchange on sensitive issues, such as gender justice and clear outputs of the process.⁷ Based on the results the organisation develops an action plan to improve its efforts to mainstream gender (both internally and externally). This plan will also be guided, if necessary, by an external consultant.

During the process, output and outcome indicators should be formulated to accompany the whole process and to make monitoring and evaluation possible. In the second Trainers of Trainers Workshop, held in April 2009, a list was made of selected key indicators. In the course of 2009 and 2010 the involved consultants and the people participating in the different organisations applied those indicators. The idea is to meet again in 2010 to exchange the experiences with the indicators, to see if they have to be adapted, if other indicators are needed, etc. However, in 2010 ON approved the proposal to monitor the GMLT with a pilot project on the alternative M&E Most Significant Change method. In 2010 a select number of involved organisations and consultants will follow a training in this method, after which it will be applied to the GMLT process in each organisation. In 2011 a follow-up meeting will be organised to know the results and exchange the experiences with this method.⁸

At the same time different regional and national meetings have taken place, bringing together different counterparts involved in the GMLT. Their aim was to exchange experiences, and learn from and support each other. In some countries, like Ethiopia, Angola and Egypt, this has led to interesting and promising dynamics, including the translation of the assessment manual into Arabic, peer-learning, strengthening of networks and the inclusion of women's organisations in the process. Moreover, participating organisations maintain contact with ON's Program Officers and gender expert. It is too early to tell what the results and outcomes of the GMLT are, but so far the processes in different countries appear promising and exiting. An evaluation of the GMLT in various countries and regions is planned for 2011.

4 The selection involved mainly counterparts working on Aim 1 (Right to a sustainable livelihood) and Aim 4 (Right to be heard: social and political citizenship).

5 See for learned lessons Brouwers, Ria (2001) *En Route*. Evaluation of the Gender Route Project Novib. Oxfam Novib. The Hague. Mukhopadhyay, Maitrayee, Gerard Steehouwer & Franz Wong (2006) *Politics of the Possible*. Gender mainstreaming and organisational change: Experiences from the field. Royal Tropical Institute. Amsterdam. The latter focuses on the experiences of seven Oxfam Novib partners in South Asia and the Middle East.

6 This was one of the lessons learned from the "Gender en Route Project."

7 See *Test your Organisation with the 12-Boxes Framework*. A Facilitators' Guide to Support NGOs in Self-Assessing their Response to HIV and AIDS in their Workplace and in their Work Using a Gender Perspective. (2007) Oxfam Novib. The Hague. Written by Verona Goverman, edited by Sue Holden.

8 See *Measuring Milestones*. A Joint Gender at Work-Oxfam Novib GMLT- PSO Capacity building in Developing Countries – Initiative, Oxfam Novib 2010.



Oxfam Novib has asked an external expert to develop a manual to support gender experts in South America, the Horn of Africa, West, East, Central and Southern Africa, South Asia, Eastern Europe and the Middle East, who assist the counterparts in the implementation of the GMLT. Verona Groverman produced a draft version in July 2008, with input from the gender consultants involved in the GMLT, provided during the GMLT's May 2008 kick-off workshop in The Hague (the Netherlands). In May 2009 these consultants came together for a second GMLT workshop and shared their experiences and comments on the draft version. More in particular, Lebesech Tsega and Bunmi Dipo-Salami provided valuable suggestions, based on their ample experience in the field of Gender and HIV & AIDS mainstreaming assessments. Based on their input, Verona Groverman wrote a second draft. Jeanette Kloosterman, ON's policy advisor on Gender and Diversity, produced the present final version, with the input of Lebesech Tsega and Nicole Metz, which is the outcome of a last revision.

Parallel to the GMLT, ON spearheads WEMAN (Women's Empowerment Mainstreaming and Networking), a process for Gender Justice in economic development interventions, including market and value chain development, financial services and economic policy and decision-making. In the context of this project, a series of manuals for Gender Action Learning System (GALS) methodology was produced, which facilitate the participatory gender analysis at family and community level and of the organisations involved in (economic) development. At the same time this methodology affects the awareness raising of men and women about gender justice, aiming at behaviour and attitude change. Some of the activities and exercises of the GALS methodology can be applied in the GMLT as well. Because ON wants to stimulate the integration of the two gender mainstreaming initiatives, we recommend the joint use and application of the different exercises. Where relevant, this is indicated in the texts of both this manual and the GALS manual.

We hope that this manual helps gender experts and consultants to coach organisations in self-assessing their gender mainstreaming competence and in developing feasible plans that contribute to a fair and just world for all women and men.

Feel free to send your experiences and comments to jeanette.kloosterman@oxfamnovib.nl

Jeanette Kloosterman
June 2010





1. Introduction

1.1 Aims and expected results of the self-assessment

In this manual you find the ingredients for a self-assessment, to be organized in a workshop setting. It is meant to support development organisations in 'screening' their gender mainstreaming competence and recognising their potential to move ahead - both in the programs and in the organisation itself. The organisation's strengths and weaknesses are identified and possibilities for improving gender mainstreaming are explored. This leads to the formulation of an action plan, with clearly defined objectives and a time-line, budget and defined responsibilities. The staff members involved in the self-assessment are taken step-by-step through critical questions and discussions concerning the extent to which their organisation addresses gender issues. The methodology allows staff to answer questions such as: why are things the way they are? Why do we act the way we do? Are we doing the right things – and are we doing these in the right way? What are the forces of change? Where are the forces that make change possible? The variety of participatory and inclusive methods as well as the tools that the manual offers provokes reflection and learning.

Aims and expected results of the self-assessment with action planning

1. To assess the organisation's gender mainstreaming competence, i.e. the extent to which it is effectively addressing and redressing gender inequalities and injustices as relevant in the local context.

The **output** is an overview of the organisation's strengths and weaknesses in mainstreaming gender, both in its programs and in the organisation itself.

2. To set priorities and develop a set of interrelated actions to mainstream gender more effectively in the programs and the organisation.

The **output** is a feasible and measurable action plan based on a list of priorities for gender mainstreaming over a defined period of time.

3. To generate a feeling of ownership and commitment among staff members to implement and support the actions agreed upon, and move beyond.

The **expected outcome** is staff members' ownership of and commitment to the agreed actions.

1.2 The key actors in the process of assessment

It is critical that an organisation's staff, men and women at different levels, is involved in the assessment to ensure that all voices and views are heard and to create full ownership of and commitment to the process of change. This belief is based on five principles which are grounded in learning from experience and reflection.¹⁰ They are: gaining experiences, which are key to learning by adults; reflection, which helps them progress and grow; personal involvement, which is central to learning and making change; sharing experiences with others which promotes the process of learning; and learning which can be enhanced through the guidance of a facilitator.

We distinguish three categories of staff whom we feel should all take active part in the assessment:

- **Program-related staff:** program policy-makers and planners, financial and personnel administrators dealing with program matters, program implementation staff, and staff in charge of program monitoring and evaluation.
- **Management staff:** staff members involved in management at different levels, such as policy-making, decision-making, budgeting, monitoring and evaluation.
- **Support staff:** staff who provide support to management and program staff to realise the organisation's vision. They include administrative officers and assistants, receptionists, cleaners, drivers, and so on.

Staff belonging to the different categories could sit together in one workshop, or separate workshops could be held for each category or for two categories together, on occasion with tools or handouts adjusted to a specific staff category. An organisation may choose for separate settings for the different staff categories. This is because some areas of attention are easier and appealing to assess for staff members with related tasks and working experiences. Whatever form is chosen, each staff member should have ample space to express his/her views and ideas based on hands-on experiences.

Other key actors in the assessment process, but with a very different role, are external facilitators to guide staff through the self-assessment. External people can better deal with the complexities of a gender mainstreaming process than staff of the organisation. Talking about inequalities and injustices is sensitive by nature, since it touches on power relations and deeply rooted beliefs and values.

External facilitators play an essential role in ensuring an effective self-assessment by guiding staff through the self-assessment process and creating an environment in which all staff members feel at ease to share views and ideas. The facilitators need to be skilled in facilitation techniques and knowledgeable about gender concepts and organisational and programmatic gender mainstreaming. Generally, a team of two external facilitators is recommended, one focusing on the process and the other on the content. If desired by the organisation, the facilitators could also play a role in knowledge and skills training, and during the implementation of the action plan.

10 See, for instance Kolb, D. A. (1984) *Experiential Learning*, Englewood Cliffs, NJ.: Prentice Hall P. Jarvis (1995) *Adult and Continuing Education. Theory and practice 2e*, London: Routledge; Rogers, C.R. & Freiberg, H.J. (1994). *Freedom to Learn* (3rd Ed). Columbus, OH, Merrill/Macmillan.

1.3 The set-up of the self-assessment process

The self-assessment is done through a set of assignments to be implemented in a workshop setting.

The assignments and tools presented in this manual can be implemented flexibly and creatively. That means that this manual is not a blueprint. Gender experts and facilitators can pick and choose from the assignments and instruments, depending on the situation and organisation (context), add other ones or adjust them as desired!

The total duration of the assessment depends on the way you organise it: the number of exercises you plan to do, if you work separately with different staff categories or in a combined setting. When you work separately with different staff categories or the number of participating staff is too big, you should ensure that all staff or representatives of each category are present during the drafting of the action plan and final planning. The focus here is on priority setting and action planning and it is important to create consensus and ownership at different levels.

In Figure 1 we present the flow of the self-assessment process. It starts with a vision exercise to set the minds of participating staff: how do they vision their ideal organisation and programs in terms of gender justice? Such a vision can be seen as the final destination of their gender mainstreaming journey. The second step concerns the assessment of the organisation's gender mainstreaming competence to find out how much progress the organisation has made in gender mainstreaming; here, the '12-boxes framework' serves as the core assessment tool. You can find more information about this tool and the way to work with it in chapter 3. Considering the vision and the outcome of the assessment, the third step focuses on the concrete actions the organisation wishes to take to continue its journey and, moreover, on how it can monitor its progress.¹¹ This final part should lead to the expected results mentioned above: an overview of strengths and weaknesses and a draft action plan that addresses the priorities for mainstreaming gender in the organisation's programs and in the organisation itself.

¹¹ The idea of a journey along a road towards a vision is in line with the methodology proposed in the Gender Action Learning System which is currently developed by Linda Mayoux for Oxfam Novib's WEMAN programme (Women's Empowerment Mainstreaming And Networking for gender justice in economic development). The starting point of GALs is the community level to promote gender justice while the 12-boxes based methodology focuses on the organisation and its programs.

Figure 1. The flow of the self-assessment process: the gender mainstreaming journey



1.4 How to prepare the self-assessment process

Facilitating a self-assessment process on gender-related issues is a challenging task. Some pertinent questions that could emerge, and to which answers have to be found together with the organisation are: How to ensure management's support to a process of reflection and change? How to motivate staff to engage in such a process? How to promote full participation and a free exchange of opinions and views between staff at all levels? As with any workshop good preparation is crucial.

You can have one or more preparatory meetings with a few staff members of the NGO who are interested in taking up the process and have the mandate to take decisions. You can think of a gender committee, management, key influential staff members, and so on. These meetings are important moments to build rapport with staff – good relationships are a critical condition to be able to facilitate the process. Furthermore, these meetings are functional in allowing them to understand the assessment process and for you to learn more about the felt urgency to mainstream gender in the organisation and at the program level.

Experience shows that starting the very initial meetings with the management is imperative in most organizations; unless the management gives the go ahead and assign the key staff to assist in putting the logistics and other practical arrangements, it would be difficult to pursue the process and for the staff to give background information about the

organisation and its programs and the level of gender mainstreaming. Moreover, decision to release the staff from their duties for the workshop and when (timing - the best period to have the assessment, the venue, etc.) are decision makers' jurisdiction.

In the preparatory meeting you can explain the methodology and its basic principles so that the participants understand the process and what they can expect. Staff can also give you background information about the organisation and its programs and the level of gender mainstreaming in both.

It is very important to realise that it can be necessary to organise a short gender training before the assessment takes place, in case staff members know little about gender justice and gender mainstreaming.

You can use the assignments 7, 8, 9, 13, 15, 16 or 19 for this.¹² This helps staff detect further gaps in knowledge or understanding during the self-assessment, which they may wish to address in their action plan. You then decide how to go about the assessment process and the number of workshops and their participating staff.

A report can be produced of the self-assessment exercise. It should include the visible outputs: the strengths and weaknesses of the organisation's gender competence, the extent to which gender is mainstreamed in the programs, the drawing of the proposed organisation's gender mainstreaming journey and the prioritised actions to be taken to mainstream gender more effectively. If interesting discussions take place or good practices or stories emerge, they should be included in the report as well. If separate workshops are being organised, staff first writes a provisional report of each assessment to be used in the final planning workshop where all staff gets together.

1.5 Practical organisational matters to discuss with the NGO during preparation

- **The timing** – when is the best period for having the assessment? A feasible duration will have to be negotiated for each workshop, and for the final one in the case of separate workshops for the different staff categories.
- **The venue** - at least one large room is needed with space for large flipcharts to be pasted on the walls and for allowing circular sitting arrangements and group work.
- **The participants and the invitations** – what are the characteristics of the participants? It is advisable that their number does not exceed 25, except for the final part (on planning), which could have a maximum of 40 participants.
- **Attendance** – what can be done to ensure that participants stay for the duration of the workshop, and are not pulled away by other work commitments?
- **The language(s) to be used** during the workshop. Are translators needed, or can

¹² See also the Gender Justice Diamond in: Tree of Diamond Dreams: Visioning and Committing to Action on Gender Justice. Gender Action Learning System (GALS) Stage 1, WEMAN manual, Linda Mayoux, 2010 and Steering life's rocky road. Individual and Community Gender Action Learning. GALS phase 2. Manual for field testing and piloting, Linda Mayoux 2010.

methods be modified e.g. using mime, drawings? What options exist to enable mixing and sharing between participants speaking different languages?

- **Materials and equipment required** – a good number of flipcharts, different colour markers for all participants, coloured cards or paper to make cards, notebooks and pens for the participants. Optional extras are a video player and/or DVD player.
- **Photocopying facilities**. The participants use various handouts during assignments which need to be copied.
- **Logistics** – accommodation, food, per diem, transport, and so on.
- **Finance** – budget. Opportunities to raise (extra) funds or to work more cost-effectively
- **Opening and closing sessions** – how to do it and by whom.
- **Reporting** – who will be responsible for reporting and how will the report of the assessment and planning parts be disseminated among staff?

The full self-assessment can be prepared in four steps:

- First, decide together with the NGO how many workshops to organise and their duration – whether to opt for separate ones for each staff category or a single workshop covering both the assessment and planning parts. Next, select relevant assignments described in the manual for the staff categories and make an outline of the workshop(s). In case all staff attends you could separate them into different categories to work on different assignments at the same time. Look for video tapes or DVDs which might be used in the workshop, as appropriate.
- Then, go over the assignments in the manual. Check if they are appropriate for the situation at hand. You may also need to arrange translations into the local language of some parts of the manual, especially the handouts.
- Make the program, prepare whatever is indicated and required for each specific assignment. It is important to review the connection between each stage of the workshop(s) and the next step; it may be necessary to readjust the next assignments and handouts.

1.6 How to use this manual

- Gender experts and facilitators can pick and choose from the assignments and instruments, depending on the situation and organisation (context) and add other ones or adjust if desired! It would be good, however, to cover all twelve characteristics of the 12 boxes framework.
- The manual is meant to guide the assessment process in a flexible and participatory manner. The process entails a step-by-step excursion past critical questions and discussions
- Modify assignments and the handouts for the participants where needed or prepare other assignments, tools and handouts. Some organisations have a small number of staff, which could mean that you have to adjust the methods proposed. Make sure that you vary the methods for discussion and exchange.
- Pay special attention to the handouts of the assignments. These handouts contain a number of guiding questions to help staff identify organisational strengths and weaknesses. You could modify the questions to make them relevant to the situation and nature of the organisation. It is also useful to delete irrelevant questions and add relevant ones. Try to limit the number of questions that you propose.
- Pay special attention to language and wording – use appropriate language and terminology that participants can understand. The statements and questions may contain difficult concepts, which you may have to explain.
- Use your own methods, games and tools. Add energisers. Be flexible and creative. Try to be attentive to individual participation.
- It is important for staff to notice that open and frank discussions are key to identifying the correct gaps and suggest appropriate solutions (actions).
- The facilitators need to convince the management to encourage open discussion and also be a part of the whole process.
- A relaxed and motivating environment is important for facilitating enhanced individual and group participation.
- It is critical that the organisation's staff, women and men at different levels, is involved in the assessment. If participating staff is new to the organisation or still in their trial period, they may have limitations in making an adequate assessment of the key elements (e.g. organisational culture). It is important to pay attention to such issues.
- Staff is distinguished by their functions and roles in their organisations. In the manual staff is classified into three categories: program, management and support staff. It is also possible that branch offices form one batch of participants for this purpose. It is up to the facilitators to determine the most appropriate and practical arrangements for the workshops for a particular organisation.



Notes

A large area of horizontal dotted lines for taking notes.



2. The 12-boxes framework

– an instrument for assessment, learning
and action planning

2. The 12-boxes framework

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2.1 Introduction

The 12-Boxes Framework is an instrument to assess to what extent the application of a gender justice perspective has been mainstreamed in what the organisation stands for and what it does. It serves as a tool for learning and action planning. The 12 boxes represent twelve elements which all well-functioning organisations have in common, for instance, policies and year plans, decision-making, norms and values underlying the work, and so on. The twelve elements are an organisation's building blocks. They are interrelated and framed in a specific way, based on the ideas of Tichy.¹³ The framework is presented in figure 2. The columns refer to an organisation's characteristics:

- **The organisation's mission and mandate.** This is about what the organisation stands for. The mission and mandate guide and set boundaries for the programs and activities.
- **The organisational structure.** The way tasks and responsibilities are defined, conditions set for doing the work, decisions made and internal and external co-operation is shaped.
- **The organisation's program work.** It is about what the organisation does and how programs are designed.
- **The staff.** The men and women who carry out tasks to run the organisation, their space to do the work and their attitudes at the workplace.

According to Tichy, the functioning and continuity of an organisation are shaped by three different fields or viewpoints of interaction: technical, political and cultural. The three fields form the three rows in the framework:

- The **technical** field of interaction is about the organisation of social, financial, and technical resources. It includes the organisation's policies and actions, its systems and procedures, the way programs are designed and the capacities and expertise of its staff. This field is the body and organs of the organisation.
- The **political** field of interaction is about who influences and deals with what and

¹³ The 'mother' of the 12-Boxes Framework is the gender nine-boxes framework, which was adjusted from the nine-boxes framework developed by Tichy. See N.M. Tichy, 1983, *Managing strategic change*, Wiley, New York. The gender nine-boxes framework has been used in different settings to get an insight into gender competence, e.g. the Gender Route Project of Novib implemented from 1996 – 2000, support to gender mainstreaming to partners of CIAT, WOCAN. For a training manual, see V. Groverman and J.D Gurung, 2001, *Gender and Organisational Change, Training Manual*, ICIMOD, Kathmandu. The 12-Boxes Framework presented here is based on the experiences with the same instrument for self-assessing the HIV competence of NGOs. See *Test your organisation with the 12-Boxes Framework. A facilitators guide to support NGOs in self-assessing their response to HIV and AIDS in their workplace and in their work using a gender perspective* written by Verona Groverman, edited by Sue Holden. 2007, The Hague: Oxfam Novib.

whom, and how resources and power are allocated. This field refers to the inner processes which make an organisation function, like the blood flow between the different organs in a body.

- The **cultural** field of interaction is about how the organisation is shaped by societal and organisational beliefs, norms, and values. Cultural aspects are usually, but not always, shared by staff. The cultural aspects form the personality or identity of the organisation.

In essence, the 12-Boxes Framework is a learning tool. It helps staff reflect on where an organisation and its programming stand in its efforts to achieve more gender justice, which strategies were successful, which others failed, and how to do things better or differently. Reflecting on and analysing the strengths and weaknesses by walking through the twelve boxes creates insight into the level of gender mainstreaming. Based on that, actions can be proposed to address the weak points while building on the strengths. The framework enables the organisation to consider systematically the influence an action in one box may have on aspects located in other boxes.

2.2 The 12-Boxes Framework through a gender lens

The 12-Boxes Framework helps to look deeper into one of the major challenges that all organisations face: how to mainstream gender both in the organisation itself and in the programs, with the final aim to achieve more gender justice in the society the organisation works in. Let's unpack the different elements of the framework to understand this challenge.

2.2.1 Elements related to mission and mandate

Box 1. Policies and Actions

Key to every organisation's effectiveness is its policies. Some organisations have formal and well-developed policies covering a wide variety of issues, while others have more or less agreed on general principles of work. Organisational policies guide the staff at all levels in priority setting and decision-making about programs, partnerships, recruitment, career planning and other human resource management issues and systems to ensure that the organisation runs smoothly and is capable of facing challenges, has administrative procedures, and so on.

Organisational policies address critical issues that allow the organisation to function and execute its programs effectively and efficiently. Policies are not developed in a vacuum. Staff may come up with new insights or desires, for example, the need for an HIV workplace policy to address the impact of HIV and AIDS on the organisation. Or, they may propose more space for women to assume leadership positions, requiring adjustments to the human resource policy. External factors also play a role in policy development such as national government priorities and regulations, requests from project participants and donor priorities. Each organisation has its own ways of developing policy and its own norms and procedures on whom to involve or not to involve in such a process. In some cases it may be management staff and board members only; in other organisations a wide variety of stakeholders can be involved. Policies are made operational through annual or longer-term plans with budgets. Planning and budgeting are essential processes to run the organisation. These elements of an organisation are brought together under "Policies and Actions" and form Box 1. Some critical elements with respect to Gender Mainstreaming in this box are:

Box 1. Policies and Actions

- The vision and mission and mandate reflect a gender perspective.
- The organisation's product contributes to the empowerment of women and a change in unequal gender relations at the target group levels.
- There is concern about gender equality issues in policies (policies for community level work; policies for advocacy and communication; human resource development, promotion, wages, sexual harassment, etc.)
- The organisation has a gender policy with an activity plan, time frame, allocation of responsibilities, M&E and adequate financial resources.

Box 2. Influences on Policies and Actions

The extent to which attention is paid to gender justice depends on the policy development process, and to a large extent, on the gender sensitivity of people involved in this process. Directors, managers and board members usually take part in policy development and action planning. Depending on the type of organisation, others may play a role as well. Some organisations include male and female community leaders in the design and planning of policies. Others invite professionals and organisations that share similar values to participate in discussions on specific policies. Donors may also be influential. Some elements related to gender mainstreaming are grouped in Box 2. Influences on policies and actions:

Box 2. Influences on Policies and Actions

- Management and board take responsibility for policy development and implementation in the field of gender justice.
- Management promotes internal consultations on issues related to policy development, implementation of programs and takes opinions of internal stakeholders seriously (inclusion of the voices of women and men who are conscious of and committed to gender justice, gender specialists).
- Interactions with external stakeholders, such as project participants (women and men), pressure and interest groups, researchers, consultants, gender networks and institutes, donor agencies, etc.

Box 3. Organisational Culture

Organisational policies are rooted in beliefs, values and norms about what and who is perceived important and how the world should look like. These aspects belong to the organisational culture, which is unique to every organisation. They form not only the basis of the policies, but also of the focus and strategies of its programs, its priorities and choices, its procedures, the way decisions are taken, and of partnerships and other relations. Staff members often explicitly or implicitly communicate about beliefs, values and perceptions, which makes it possible to run the organisation and its programs smoothly. Over the years they have been socialised the way things are done and perceived. This does not mean though that every staff member automatically adheres or agrees to all of them. There could be tension between beliefs and values of individual staff members and those of the organisation. As any culture, organisational cultures are dynamic: they are capable of self-preservation and also of self-adaptation or transformation through learning or innovation. These capabilities show that change happens in a dynamic interplay: resistance to change and desire to do things differently. When it comes to gender mainstreaming, the transformation of culture and norms is critical. Working towards gender justice is not only about changing policies or decision-making processes. It requires more: a deep change at the level of organisational culture.¹⁴ In the 12-Boxes Framework, Organisational Culture forms box 3. Gender mainstreaming reflects itself in the following aspects:

¹⁴ More can be read about organizational culture, gender and change in Díaz González, Olga Sofía (2001) Gender and Change in the Organizational Culture. GTZ. See also Kelleher, David and others of Gender at Work in: Gender at Work's Approach to Change: Building Cultures of Equality And Social Justice, www.genderatwork.org

Box 3. Organisational Culture

- Everyone feels ownership of the gender policy.
- Supportive and safe environment for all staff to do their work to their satisfaction, irrespective of their sex, age, health or HIV status, and other diversities.
- Norms and values support gender-sensitive leadership and female leaders.
- The organisation demonstrates gender sensitive behaviour, for example in terms of language use, jokes and comments, images and materials.
- The organisation has a reputation of integrity and competence on gender issues (for example among women's organisations and [outside] individuals committed to gender issues).

2.2.2 Elements Related to Organisational Structure

Box 4. Responsibilities, procedures and systems

Technical elements related to structure are responsibilities, procedures and systems, as found in Box 4. They are required to organise the social, financial and technical resources and know-how in order to properly manage the organisation and programs. Procedures have to be in place to ensure that the right steps are followed, for example, in administrative matters, the approval of project proposals, budget allocation, preparation for decision-making, staff recruitment and the use of facilities. Systems are needed to make sure that information is disseminated to the right people, that activities are co-ordinated, that monitoring and evaluation take place regularly, that data are being processed, that complaints can be forwarded, that certain people work together with others, to mention a few examples. Systems are also required to enable the establishment of relationships with other organisations and professionals, for instance, through partnerships or networks. Lastly, people inside and outside the organisation should be clear about who is responsible for what within the organisation and what their jobs, tasks and positions are about. In a gender mainstreamed organisation responsibilities, procedures and systems are fair and just to both female and male staff and promote equality. It means, for instance, that recruitment procedures do not discriminate against women or men, or on the basis of age, language, accent, way of dressing, health status or other characteristics, and systems should allow all staff to combine work and family obligations, such as caring for children or sick relatives.

Box 4. Responsibilities, procedures and systems

- Everyone feels ownership of the gender policy.
- Supportive and safe environment for all staff to do their work to their satisfaction, irrespective of their sex, age, health or HIV status, and other diversities.
- Norms and values support gender-sensitive leadership and female leaders.
- The organisation demonstrates gender sensitive behaviour, for example in terms of language use, jokes and comments, images and materials.
- The organisation has a reputation of integrity and competence on gender issues (for example among women's organisations and [outside] individuals committed to gender issues).

Box 5. Decision-making

One of the most critical elements of the 12-Boxes framework is Decision-making, Box 5. Whatever policies or programs are designed, and whatever plans are made, decisions need to be taken on the final choices and to put them into action. Organisations have different arrangements on how to make decisions and whom to involve. To mention a few options: there are formal or informal decision-making processes, consultations in which staff at different levels can jointly express their views, or hierarchical forms of decision-making. Decision-making very much applies to gender mainstreaming, because if important decisions are made without the involvement of people who represent women's interests, it will be difficult to mainstream gender in an organisation.

Box 5. Decision-making

- Decisions are made on the basis of monitoring and evaluation exercises, amongst others in the field of gender justice.
- Enough human and financial resources are made available for proper gender mainstreaming in programs.
- Management of gender-related conflicts.
- Decisions (in the field of gender) are dealt with in a timely manner.



Box 6. Co-operation and learning

In the 12-Boxes framework we distinguish a special set of organisational beliefs, values and norms linked to learning and internal and external co-operation. These elements are in box 6 Co-operation and Learning. This box is positioned in the ‘organisational structure’ column because such beliefs, values and norms underlie structural issues. The beliefs, values and norms about co-operation and learning and the dominant organisational beliefs, values and norms of Box 3 reinforce each other. Most of the time gender mainstreaming involves learning and exchange of experiences in gender issues at all levels. People have to be trained in the implementation of a gender perspective, which implies the allocation of resources and the effective participation of staff in training.

Box 6. Co-operation and learning

- There is support for team work of women and men, including gender focal persons.
- Effective mechanisms exist for co-ordination, consultation and organisational gender learning between various parts of the organisation, both horizontally and vertically.
- Exchange, collaboration and other forms of interaction with women’s organisations and organisations, institutions and individuals active in the field of gender are promoted and supported.
- New, innovative ideas and practices are welcomed, reflected upon and incorporated into existing practices.



2.2.3 Elements Related to the Programs

Box 7. Program design

Every organisation chooses certain procedures and steps to start up programs and to work towards desirable results in line with its mission and vision. The cycle usually starts with an analysis of the situation, followed by designing a program. This includes the planning process. Then there is the implementation process and related to that, monitoring and evaluation, both with procedures and approaches typical of the organisation. We have called this part of an organisation Program design, which is Box 7. Gender mainstreaming means that organisations incorporate a gender justice perspective into all the mentioned steps in order to ensure gender just program outcomes. If an organisation does so, it may be confronted with questions such as: what are women's needs and constraints in a setting where women are not supposed to express their views? Or, what strategies will most effectively influence or change legislation to facilitate women's land ownership? Or, what did we learn e.g. last year, regarding the program's effects on women's and men's positions in the community?

Box 7. Program design

- There is a gender analysis of the context in which the program operates.
- Design, planning, implementation, monitoring and evaluation of activities are done with a gender perspective and are disaggregated by sex.
- Gender sensitive approaches and strategies that are coherent with the vision and mission.

Box 8. Influences on Program design

Designing can be seen as a set of technical processes that follow procedures, take steps and mirror system characteristic of the organisation. But these processes involve people, who make decisions and implement them. It is also about the space provided for the participation of stakeholders. They are people belonging to the organisation, such as managers, supervisors, field staff, board members, or people from outside the organisation, such as community members, activists, staff of supporting organisations, consultants or donors. Those who play a role in these processes have varying degrees of influence on decisions concerning, for example, the selection of target groups, key items to be addressed, or approaches. Decision-making and implementation are not only based on rational arguments. Underlying the choices made and the actions taken are beliefs and values about whom and what is important and urgent to address. These aspects are reflected in Box 8: Influences on program design. The challenge here is how to make gender an integral part of influencing the processes of program design in such a way that it leads to equal participation, equitable benefits and just and fair outcomes for women and men, both inside the organisation and at the program level, while respecting their different needs, interests and views.

Box 8. Influences on program design & management

- Space provided to women and men of communities and other work areas in order to bring their views to the fore and exercise pressure.
- Space provided in decision-making processes to female and male informal and formal leaders who are committed to gender equality and justice.
- Gender sensitivity of those who influence the decision-making on programs (management, staff, external stakeholders)
- Conversion of gender-related decisions into implementation.

Box 9. Program work

If an organisation's programs are designed with a gender approach, this will be reflected in the activities, the way monitoring and evaluation is done, and also in the attitudes of program staff. Program staff seeks actively to involve, for instance, women in the project activities and to challenge existing gender stereotypes. Both the "technical" work and the "social" work are valued and staff members with differing expertise respect and support each other. Also, gender justice can be made very explicit in the program work, in special projects for women or projects with gender justice as the main theme. Box 9 reflects those aspects.

Box 9. Program work

- Gender Justice is concretely and well-reflected (mainstreamed) in the design and implementation of all programs and projects.
- Both sexes and people with other diversities are targeted in programs and activities, with a gender justice perspective.
- Women's and transformative leadership is actively promoted in the communities or organisations the program works in.
- The existence of specialized programs on gender justice or women's rights.

2.2.4 Elements Related to Staff

Box 10. Staff capacity and expertise

All the members of staff (managers, program personnel, secretaries, drivers, cleaners; men and women alike at all levels of the organisation) have their role to play and are important to the functioning of an organisation. Each of them needs specific knowledge and skills to enable his/her do to the assigned job. The situation in which people work and the equipment or materials they use often changes. Consequently, the demands on their job also change. Therefore, organisations arrange training to refresh or upgrade staff capacities. We call this key element of an organisation Staff capacity and expertise – Box 10, which contains several aspects related to gender mainstreaming. Mainstreaming gender requires that all staff, regardless of their position and job description, understands what gender justice is about and how to address this issue in their work. Program staff needs to understand what is meant by gender justice and feel confident to address it. For instance, understand what needs to be done to overcome barriers for women to participate in water committees, or in an advocacy meeting with the local governor.

Box 10. Staff capacity and expertise

- Gender Justice is concretely and well-reflected (mainstreamed) in the design and implementation of all programs and projects.
- Both sexes and people with other diversities are targeted in programs and activities, with a gender justice perspective.
- Women's and transformative leadership is actively promoted in the communities or organisations the program works in.
- The existence of specialized programs on gender justice or women's rights.

Box 11. Room for manoeuvre

Staff may have the knowledge and skills to apply a gender justice approach, which does not automatically mean that they can do that in each and every situation. One of the factors which helps or hinders staff members to do so is the freedom or space they have in the organisation. In some organisations managers or supervisors allow staff members to make their own work schedules, come up with new ideas, try out innovations and establish work contacts. In others, staff has to work within preset boundaries. Staff members, such as gender focal points, often make efforts to stretch these boundaries by carefully manoeuvring. The extent to which supervisors or managers support staff members, indicates how much freedom staff has. Support can take different forms of incentives, or the creation of an environment in which staff members feel at ease to carry out their tasks. This Room for manoeuvring is another key element in an organisation and forms Box 11 of the framework. Addressing gender issues requires space: to put gender equality issues on the decision-making agenda, to discuss the challenges that are related to women's participation in program activities, to propose female colleagues in leadership positions, and the like.

Box 11. Room for manoeuvring

- Adequate infrastructure to enable (male and female) staff to carry out their work (e.g. in relation to safe working environment, toilet facilities, transport arrangement, working hours).
- Incentives and recognition given to gender-related work.
- Open and obvious support of management for people who work on Gender Justice issues.

Box 12. Attitudes

Other factors that determine whether or not staff members will put their knowledge and skills into practice have to do with their individual beliefs and attitudes. Beliefs and attitudes of staff, from managers to support staff, towards the work they do have an impact on the performance of the organisation or the programs. The attitudes of staff, based on their beliefs and values, are grouped in box 12 Attitudes. Staff's beliefs and attitudes about gender roles and relations very much influence the process of gender mainstreaming. An organisation that wishes to address gender justice faces the challenge to make each and every staff member believe that inequalities between the sexes are unacceptable and that people are committed to working towards gender justice. Attitudes of staff members towards colleagues have an impact on their well-being and can affect their output. Indeed, a staff member who is the butt of jokes because of his 'feminine' behaviour or stigmatised because she is believed to be HIV-positive will not work with much pleasure. Staff may be unaware of these prejudices, or may be careful in expressing them.

Box 12. Attitudes

- No stereotyping and stigmatising attitudes and behaviour towards people of a different sex, ethnicity, health or HIV status, class, sexual orientation and other distinguishing traits.
- Different styles of working are valued (e.g. men and women in non-traditional fields of work, leadership styles, ways of chairing meetings, etc.).
- Staff's beliefs about the importance of addressing gender inequality and injustice issues in their work.
- Gender issues are discussed openly by men and women.
- Transformative leadership and women leaders are valued.

Figure 2. The 12-Boxes Framework for gender mainstreaming

	MISSION AND MANDATE	ORGANISATIONAL STRUCTURE
<p>TECHNICAL FIELD OF INTERACTION (the body with its organs):</p> <p>The organisation and management of technical, financial and social resources.</p>	<p>1. POLICIES AND ACTIONS</p> <p>Do policies and actions incorporate and reflect a gender justice perspective?</p>	<p>4. PROCEDURES, SYSTEMS AND RESPONSIBILITIES</p> <p>Do procedures and division of responsibilities reflect and promote gender justice?</p>
<p>POLITICAL FIELD OF INTERACTION (flow between the organs):</p> <p>Who influences whom and about what? This question relates to power and resource allocation (social, financial, technical) and to who reaps the benefits.</p>	<p>2. INFLUENCES ON POLICIES AND ACTIONS</p> <p>Do the people involved in policy making support and actively pursue gender justice issues?</p>	<p>5. DECISION-MAKING</p> <p>Does management take gender justice issues into consideration in formal and informal decision-making on organisation and program matters?</p>
<p>CULTURAL FIELD OF INTERACTION (the identity):</p> <p>Who talks to whom about what? This question relates to relations, values, standards, beliefs and interpretations shared by staff.</p>	<p>3. ORGANISATIONAL CULTURE</p> <p>Do beliefs, norms and values in the organisation accept and show concern about gender justice issues?</p>	<p>6. CO-OPERATION AND LEARNING</p> <p>Do the norms and values on learning and co-operation among staff and with outsiders, reflect concern about gender justice?</p>



PROGRAMS	HUMAN RESOURCES
<p>7. PROGRAM DESIGN</p> <p>Do programs dispose of the technical means (budget, tools, expertise) for the integration of a gender justice perspective?</p>	<p>10. STAFF CAPACITY AND EXPERTISE</p> <p>Does staff have the capacities and expertise to address gender justice issues?</p>
<p>8. INFLUENCES ON PROGRAM DESIGN & MANAGEMENT</p> <p>Do people who participate in program work influence management and program design to pursue actively a gender justice approach?</p>	<p>11. ROOM FOR MANEUVER</p> <p>Is there freedom and space for staff members to address gender equality, both at the organisational and program level?</p>
<p>9. PROGRAM WORK</p> <p>Is gender justice addressed in the program work?</p> <p>Staff's beliefs about the importance of addressing injustice issues in their work.</p>	<p>12. ATTITUDES</p> <p>Do staff members express their concern and commitment about gender inequalities?</p> <p>Staff's commitment to include both sexes and people with other distinguishing traits in programs and activities.</p>



In summary, the 12-Boxes Framework can be used for three purposes:

- To make a **diagnostic** for identifying the organisation's and program's strengths and weaknesses from a gender justice perspective. Based on this diagnosis ideas and actions can be proposed to address gender inequalities and injustices more effectively, both in the programs and inside the organisation itself.
- To formulate a gender mainstreaming **strategy** of different but related **actions** that are required to deal with the strengths and weaknesses identified, aiming at more equality and justice for program participants and female and male staff. The logic of the framework encourages organisations to appreciate all the changes that are needed, rather than respond in a limited way.
- Lastly, it can be used to **monitor** progress and to make adjustments regularly to the gender mainstreaming strategy and action plan.

The critical analysis of each of the twelve boxes shows the organisation's strengths and weaknesses in addressing gender justice. The importance of the framework is that it helps in understanding the interconnection between the different fields of interaction. To give a hypothetical example: program staff may have identified the weakness that in the program design gender inequalities in terms of access to resources have been overlooked (which fits Box 7). This weakness may have to do with another identified weakness: inadequate understanding of staff about gender issues (Box 10). Although the organisation values learning and training ('a strength' – Box 6), a budget was not allocated for regular training sessions because training was never on the agenda for decision-making (Box 5).



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3. Assessment and Planning

3. Assessment and Planning

3.1 Introduction

This part of the manual contains the assignments and tools for exploring, explaining and deepening the content of each box of the 12-Boxes Framework. Workshop participants gradually ‘walk through’ the 12-Boxes Framework, assessing each field of interaction through a gender lens and, accordingly, come to an overall assessment of the organisation and its programs. This will trigger ideas for actions to be taken in order to better address gender issues at both levels. These actions can be laid down in an action plan, which is the final phase of the assessment. Paragraph 3.9 and the assignments 20-22 refers to this part.

The expected achievements of the assessment are:

- An overview of an NGO’s strengths and weaknesses in mainstreaming gender, at the program and organisational levels.
- Staff members’ ownership of the process and the outputs of the assessment.
- A draft outline of a GJ (Gender Justice) action plan for the organisation

After a first session, with three exercises meant to get to know each other (if needed), to introduce the assessment process and a visioning exercise, the suggested assignments are organised by the twelve boxes we explained in the previous chapter.

A workshop session can be made up of several assignments the facilitator may choose from, according to an organisation’s needs and the context it works in. It is neither necessary to follow the boxes in the order presented, nor the assignments. We stress again that it depends on the experiences, creativity and insights of the facilitator to choose the exercises and the order in which he/she uses them. Therefore, it is important to consider the five crucial points in the box below:

In some assignments participants go over a set of guiding questions which help them identify the strengths and weaknesses of an organisation’s gender mainstreaming competence. For each assignment the expected results, estimated duration, method and materials required are listed. As regards the duration of each assignment, it is only an indication as it depends on the number of participants, their level of understanding and experiences on the issue at hand, to name a few factors. The estimate is based on 18 to 20 participants.

Note For examples of assessment reports, done by ON counterparts, see www.oxfamkic.org Community “Gender Mainstreaming and Leadership Trajectory.”

The participants first work towards a complete picture of an organisation's gender competence. It is recommended that you introduce the 12-Boxes Framework only at the end of the whole assessment process. At this point you return to the visioning exercise done at the beginning of the process. It is now possible to facilitate the discussion on what concretely needs to be done to address gender better in the organisation and programs.

3.2 Introductory Session

Assignment 1.

Introduction of the participants: a game

Assignment 2.

Introduction of the self-assessment and action planning process

Assignment 3.

To vision a gender- sensitive organisation and - program

Assignment 1. Introduction of the participants: a game

- Objective:** Participants get to know each other better
- Participants:** All staff, either in separate categories or groups where different staff categories are mixed.
- Expected results:**
- Participants find out more about each other in a playful way.
 - Participants feel at ease and are interested to connect with the process of self-assessment and action planning.
- Estimated duration:** 30–45 minutes, depending on the number of participants.
- Method:** There are a variety of methods for introducing participants who may already know each other. You should choose a culturally appropriate one. We give two suggestions.
- a. Drawing game: Invite each participant to draw on a coloured card “anything you like that describes you” (for example, an animal or an object). Then, ask the participants to stand up and explain their drawing to as many other participants as possible while walking around the room. Each listener signs his/her name on the back of the card. After 10 minutes let the participants sit down. Ask how many signatures each participants has collected. Invite a few people who have collected a lot of signatures to tell about other participants they met, until everybody has been introduced.
- Materials required:** coloured cards and markers
- b. Free time: Ask the participants to stand up. Invite them to share their favourite and meaningful free time activity (e.g. chatting with neighbours, sports, music) with as many other participants as possible. After 10 to 15 minutes ask people to form groups according to their free time favourites, and explain to others why they attach importance to their favourites. Are there any observations to make – for example about gender differences?

Assignment 2. Introduction of the self-assessment and action planning process

After the participants have introduced themselves, explain the objectives of the self-assessment, its desired outputs and its characteristics. Present the different steps of the process and present the program of the workshop.

Ask each participant to mention expectations and one hope and fear concerning the process.

Lastly, together with the participants set the ground rules for participation in the workshop(s).

In groups people discuss and draw or write down 3 to 5 expectations they have of the assessment and 3 to 5 norms they think should govern the meeting. These are then fed back to the plenary. The facilitator responds by mentioning the expectations that are likely to be fulfilled and those that cannot be met at this event. An understandable summary in pictorial and/or written form is then prepared over the break.

Outputs are:

- Clarified expectations which can be met (eventually list of needs for other events)
- List of hopes and fears
- Agreed norms.¹⁵

¹⁵ This exercise is partly taken and adapted from Tree of Diamond Dreams: Visioning and Committing to Action on Gender Justice. Gender Action Learning System (GALS) Stage 1 Manual- WEMAN, Linda Mayoux, 2010. See www.wemanglobal.org

Assignment 3. To vision a gender- sensitive organisation and program¹⁶

Objective(s):	Participants develop a vision of a gender-sensitive organisation with gender-sensitive programs: what are its most important ingredients and how do they relate to each other?
Participants:	Management and program related staff
Expected results:	<ul style="list-style-type: none"> - Participants have a vision about what a gender-sensitive organisation and program should look like. - Participants are interested and curious in assessing their organisation and programs from a gender perspective.
Estimated duration:	60 to 90 minutes (for 18 to 20 participants).
Method:	Vision game.
Materials required:	Flipcharts and markers, notebooks and pens. Optional: copies of Handout A.

Steps for the facilitator

The vision game is optional. It is meant for staff to reflect on the end station of gender mainstreaming in their organisation. It helps in making the mind-set for the assessment. It also creates an indicator for measuring the current state of the organisation and/or programs. Note that some staff may find it easy to vision their ideal gender-sensitive and just organisation and program, while for others it may be too difficult or even confusing to imagine. When the latter is the case it is better to skip the assignment or, instead, have a short, more general discussion about the future of the organisation and gender justice. You can also postpone the vision exercise to the moment the action plan is made.

A vision is a dream which may take a long time to come true, but which is worthwhile to work towards. It is more than just setting a goal. It is often observed that organisations lack gender-sensitivity at many levels, while in programs gender-related issues are being addressed. However, the more gender-sensitive an organisation, the more likely that programs take gender issues into account.

The assignment focuses on the organisation or on the programs, depending on the staff category taking part. If management and program staff are both attending, you could split them up in separate groups. First the participants discuss in pairs or in groups of three how they vision a gender-sensitive organisation or program. When the organisation is discussed, you can opt to distribute Handout A, but be careful with this handout, it may limit the discussion. The participants then make a drawing of such an organisation or program and paste it on the wall. Afterwards small groups explain their drawing to others, while the participants move from one flipchart to the other. Next, the participants join the group or flipchart they like best. The groups thus formed sit down and discuss in more detail their vision and adjust the drawing they had chosen or produce a new drawing. The drawings are put up on the wall.

¹⁶ If participants are unaware of the gender concept, you may choose to do assignment 15 (paragraph 3.9) at this stage of the assessment process. Also assignment 19 (paragraph 3.10) could serve as a warming up exercise for the discussion about gender justice.

Handout A. What makes an organisation gender-sensitive?

The gender sensitivity of an organisation and its programs is highly contextual and culturally specific. Elements that could be found in gender sensitive organisations and/or programs are, amongst others:

- The vision or mission and mandate reflect a gender perspective.
 - Gender infrastructure is in place (FTEs for gender positions, budget, etc.).
 - There is a gender analysis of the context in which the programs operate.
 - Job descriptions include elements of gender expertise.
 - Management and board take responsibility for policy development and implementation in the field of gender justice.
 - Decisions are made on the basis of monitoring and evaluation exercises, amongst others in the field of gender justice.
 - Space is provided to women and men from communities and other working areas to bring their views to the fore and exercise pressure.
 - Adequate infrastructure to enable female staff to carry out their work (e.g. in relation to safe working environment, toilet facilities, transport arrangement, working hours).
 - The organisation has a reputation of integrity and competence on gender issues (for example among women's organisations and [outside] individuals committed to gender issues).
 - There is support for team work of women and men, including gender focal persons.
 - Gender is mainstreamed in all programs and projects.
 - No stereotyping and stigmatising attitudes and behaviour towards people of different sexes, ethnicity, health or HIV status, class, sexual orientation and other diversities.
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Notes

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3.3 Box 1

Policies and Actions

Assignment 4.

An organisation's policies and the policy development process from a gender perspective

Box 2

Influences on Policies and Actions

Assignment 4b.

Assessing policies and the policy development process from a gender perspective, in situations where the organisation has (unwritten) guiding principles instead of formal policies

Assignment 4. An organisation's policies and the policy development process from a gender perspective

Objectives:	<ul style="list-style-type: none"> - Clarify if policies and actions incorporate and reflect a gender justice perspective. - Explore if the people involved in policy-making, support and actively pursue gender justice issues.
Participants:	Management staff. Program staff could take part if they have knowledge about organisational and programmatic policies and/or experience in policy development processes.
Expected result:	Participants have identified main strengths and weaknesses of the policies and the policy development process, using a gender perspective.
Estimated duration:	90 minutes.
Method:	Quick scan with a questionnaire; discussion in different groups.
Materials required:	Flipcharts and markers, coloured cards, notebooks and pens, copies of handout B.

Steps for the facilitator

This assignment assumes that an organisation has one or more formal policies. In case these are not (well) developed, assignment 4b is an alternative. Cut cards in two colours for the strengths and weaknesses. Prepare two sets of flipcharts. Label the first set Policies and Actions, one for strengths and one for weaknesses. Label the second set Influences on Policies and Actions, again one for strengths and one for weaknesses. Explain the assignment and highlight why there is the need to assess policies from a gender perspective (you may use the explanation of the boxes 1 and 2 of the 12-Boxes Framework in section 2.2).

Split the group into two or four small groups of 5 to 6 participants. First, every group makes a quick scan of the three most important policies that guide the way their organisation operates, but which do not specifically deal with gender issues, e.g. recruitment policy, health policy, agricultural extension policy, or advocacy policy, etc. The table in handout B can be used for this exercise, by writing the names of the policy documents in the column people feel appropriate.

Next, the groups list the policies of their organisation that explicitly deal with gender issues, e.g. gender policy, affirmative action, sexual harassment, workplace policy for HIV-positive female and male staff members, and the like. If the organisation does not have such policies, skip this part. A discussion in the groups follows, about who was involved in the formulation of the policies and in their implementation. What is the impact of the gender-related policies on the way the organisation operates and, if relevant, the programs that are implemented. Do men and women have (more or less) equal opportunities, benefit (more or less) equally from policies or share power (more or less) equally? Do they feel encouraged or restricted by the policies?

Based on the outcomes of the quick scan (the table) and the discussions on gender-related policies, the groups identify three strengths and three weaknesses related to "policies and actions". They also identify three strengths and three weaknesses related to "who influences the formulation

of the policies and their implementation”. They write the arguments that underlie their choices in a notebook. They write the strengths and weaknesses on coloured cards in readable phrases.

After this group work the participants are put together into two groups. Ask the members of the groups to come to a consensus about three strengths and three weaknesses of the outcomes of the discussions. In the plenary a representative of each group presents the strengths and weaknesses identified. It is important to find out if a strength or weakness relates to the boxes 1 or 2 of the 12-boxes framework – if not, put the cards aside to use later on. Let the participants paste the cards on the flipchart concerned.

Note When in the second Trainer of Trainers meeting (April 2009) the consultants gave feedback on the manual, some felt that instead of doing the vision exercise, it might be better to start a short discussion about ‘where are we now’, and not about ‘where do we want to go’. Others felt though that a ‘light’ brainstorm about ‘what is a (gender) just society or organisation’ is an important start of the self-assessment to shape people’s mind-sets and to provide a point of reference that could be revisited at the end of the assessment.

Handout B. A quick scan of an organisation’s policies, their development and implementation processes

Policies and actions:	Very much	Rather well	Room for improvement	Not at all
The policy is based on an analysis of needs and interests of women and men (staff and/or program participants).				
The context analysis that informs the policy, includes a gender analysis, which means it looks at power inequalities, gender-based violence and other gender-related issues.				
The policy addresses undesirable gender gaps in our organisation.				
The policy addresses undesirable gender blindness in our programs.				
The policy includes action plans that show commitment of time and resources to addressing gender issues.				
Policy and action plans addressing gender issues are put into practice.				
The policy objectives and action plans related to gender issues are monitored and evaluated regularly and adjusted when felt necessary to address gender justice better.				
Influences of various stakeholders on policy development and implementation				
The different bodies (board, members, etc.) and other people who have a say in the running of our organisation are aware and supportive of addressing gender justice issues.				
Management actively seeks the opinions of female external stakeholders (such as women in the community, women’s pressure groups, and the like) and takes these seriously in policy development.				
Management actively seeks the opinions of minorities of both sexes, disadvantaged or stigmatised groups (e.g. people living with HIV) and takes these seriously in policy development				
Management seeks inputs from outside organisations or professionals with expertise on gender issues.				
The voices of female staff members are heard in policy development in equal measure to those of their male colleagues.				
The voices of gender focal points and/or other change-makers committed to mainstreaming gender are heard and taken seriously in policy development.				

Alternative

Assignment 4b. Assessing policies and the policy development process from a gender perspective, in situations where the organisation has (unwritten) guiding principles instead of formal policies

The group is divided into three groups, where the following questions, or a selection of them, are discussed. Based on the responses, a maximum of three opportunities and three challenges is identified.

What challenges and opportunities do you see in:

1. Paying more thorough attention to gender issues in your organisation's principles that guide how the organisation and programs operate.
2. Putting into action the guiding principles that pay attention to gender issues.
3. Developing a gender policy.
4. Developing a sexual harassment policy and putting it into practice.
5. Including activities that address gender issues in annual plans.
6. Allocating budget(s) to activities to address gender issues and gaps.
7. Modifying your organisation's monitoring and evaluation system to include the collection and analysis of sex-disaggregated data.
8. Inviting to the board people committed to addressing gender issues.
9. Seeking input from outside organisations or professionals with expertise on gender issues in discussions on principles that guide the running of the organisation and programs.
10. Seeking input from gender focal points and/or other staff members committed to mainstreaming gender in discussions on principles concerning the running of the organisation and programs.
11. Seeking the opinions of female external stakeholders (such as women in the community, women's pressure groups, women's organisations, and so on) in discussions on principles that guide the running of the organisation and programs.



Notes

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Notes

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3.4 Box 3

Organisational culture

Assignment 5.
Exploring the organisation's culture

Assignment 6.
Unpacking the organisation's culture

Assignment 7.
Values and beliefs about leadership

Assignment 5. Exploring the organisation's culture¹⁷

Objectives:	To clarify if an organisation's beliefs, norms and values reflect concern about gender justice. To promote exchange and learning, since culture is about what the organisation is and does.
Participants:	All staff.
Expected result:	Participants are more aware of what their organisation's culture is about and how it gives shape to gender roles and relations.
Estimated duration:	30 minutes (warming up) to 60 minutes (more thorough discussion)
Method:	Group discussion and plenary exchange
Materials required:	Handout C. Issues to be discussed in relation to the organisation's culture.

Steps for the facilitator

Be aware of the level of staff awareness about an organisation's culture, and gender. If this is low, this assignment can be used as a kind of warming-up. It helps to discuss what the organisation's culture is about and what it tells about gender roles and relations inside the organisation. Afterwards assignment 6 will help to deepen this knowledge more. If staff has more understanding about culture and gender, you can skip this exercise and only do assignment 6.

Form small groups of 3 to 4 participants and assign each group one of the issues listed in handout C, to discuss for about 25 minutes. In case you use this assignment as a warming-up exercise for the next assignment, have a brief plenary exchange when the group work is done about the main observations of the different groups. If you skip the next assignment you discuss more thoroughly the organisation's culture and its gender dimension. Make sure everybody understands what culture is about, how gender is part and parcel of it and how it is expressed in the organisation's culture. You may use the Gender Wheel that is explained in assignment 13. This tool unpacks the concept gender into five components, which can be related to the organisation's prevailing beliefs, values and norms about men and women, their roles and (power) relations.

¹⁷ This assignment is inspired by Diaz Gonzáles, Olga Sofía (2001) Gender and Change in the Organisational Culture. GTZ.

Handout C. Issues to be discussed in relation to the organisation's culture.

Group 1: The way we talk

The participants make a list of about 5 expressions in the language that is used in the organisation, for example expressions referring to race, class, sex, or other identities; reprimands; gossip; courtesy formulas; exaggerations; expressions of ridicule; jokes; sayings or proverbs. Then they write next to these expressions whether they refer to women, to men or both. A discussion follows about what these expressions could imply for the men or women they refer to. Do they help or hinder them to develop a positive self-image, to be a confident staff member, to generate good relations with others, to access opportunities to grow in the work? Lastly, discuss if the effects of the expressions about male and female staff promote or hinder a good functioning of the organisation?

Group 2: A successful staff member

The group describes the characteristics a person should possess to be successful in his or her organisation. Then they answer the following question: Who has the most chance of meeting such success criteria: men or women? Are other traits expected for successful women than for successful men? If these traits are different, what are the differences? What implications does this have for the personal and professional development of men and women in the organisation? You can think of job appraisal, promotion, selection for training, and so on. Lastly, discuss what could be the implications for the organisation. If policies make a distinction between male and female staff, would the organisation gain or lose?

Group 3: A good leader

The group describes what is considered to be a good leader in the organisation. What does such a leader exert leadership over? Are other characteristics expected from a male leader than from a female leader? If there is a difference, in what aspects do they differ? Do you think of leaders as decision-makers and/or change agents motivating and leading others through a process of change? What implications do these images of leadership have for the opportunities women and men have to become a leader? What are the implications for the organisation?

Group 4: Working together

When you do group work in your organisation, what kind of activities take place? Think of discussions, decision-taking, listening, taking notes, writing minutes, serving drinks, collecting work supplies, and the like. List these activities. Who performs these activities, female or male staff? Write it down next to the activity. Discuss if there is a difference between female or male staff where it concerns frequency in speaking, duration of speaking time, issue addressed when speaking, dominance as common attitude, negotiation and conciliation as common attitudes, passive acceptance as common attitude, interrupting the meeting, leaving the meeting, or other behaviour you may observe. Which beliefs, norms, values or traditions are at the basis of the divisions of roles and behaviours you may have observed? Does this have implications for the personal and professional development of men and women in the organisation? Does the organisation benefit or not from these differences in roles and behaviour?

Assignment 6. Unpacking the organisation's culture

Objective:	To deepen the knowledge about the organisation's culture and its gender sensitivity.
Participants:	all staff
Expected result:	Participants are more aware of prevailing beliefs, norms and values in the organisation; how they promote or hinder gender mainstreaming in policies and practices in the organisation and its programs.
Estimated duration:	90 minutes to 2 hours (for 18 to 20 participants)
Method:	Hofstede's Onion
Materials required:	Large brown paper or flipcharts; markers; cards in four different colours; notebooks and pens, copies of Handout D.

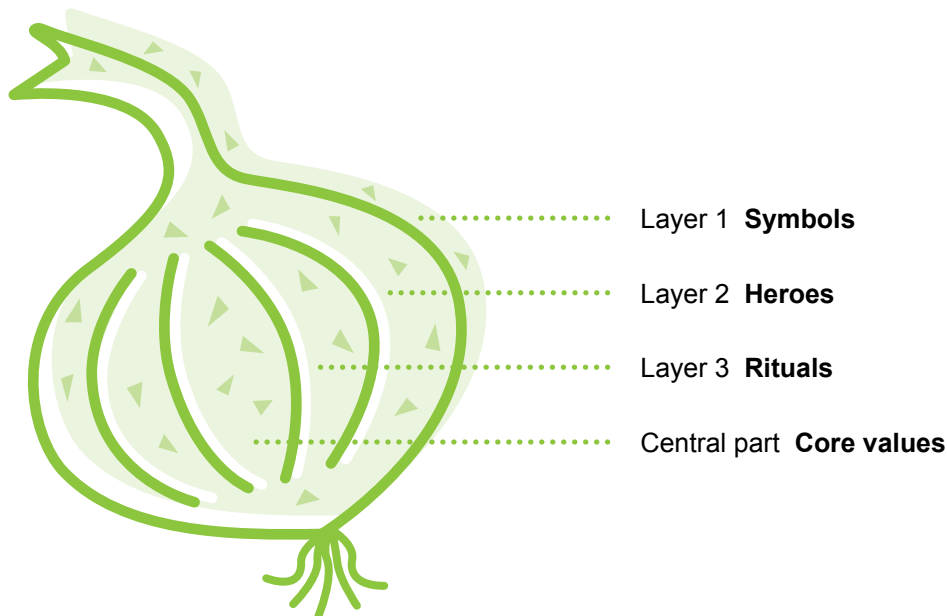
Steps for the facilitator

If you have not done assignment 6, explain what an organisation's culture is about, what beliefs, norms and values are and why it is important to pay attention to them. Explain the method "Hofstede's Onion" (see "Reading for the facilitator. Peeling Hofstede's Onion"). Put up a large brown paper or 2 to 4 flipcharts taped together and draw a large onion. Form small groups of 3 to 5 participants, distribute handout D and cards in four different colours. Each group receives one colour belonging to one layer of the onion, which is assigned to them. The group has to discuss and answer the questions belonging to that layer and choose two words or objects to write on the cards. Move around to clarify where necessary.

After about 15 minutes, you collect the cards and paste them in the right layer of the onion. In the plenary, ask the participants for clarifications and observations, possibly move cards to another 'layer' or reformulate them, and make observations concerning gender justice. What did you learn about the gender sensitivity in your organisation's culture? Which norms and values promote and which hinder your organisation to become a place where both male and female staff feels at ease? Is your organisation a safe and respectful working place for men and women? What effect does the culture have on opportunities for personal and professional development of male and female staff? Does the culture promote female leadership or transformative leadership?

Reading for the facilitator: Peeling Hofstede's Onion¹⁸

Hofstede expresses an organisation's culture as an onion with three different layers and a central part symbolising the organisation's core values. Peeling the onion helps create awareness of the organisation's culture.



Layer 1 represents the symbols: words, pictures or objects that are visible. They have a particular meaning that is easily recognised by those who share the culture. Examples are jargon, dress, pictures, furnishing of office rooms, logos, decoration, and the like.

Layer 2 stands for the heroes, champions and leaders: the men and women, alive or dead, real or imaginary, who have characteristics that are held in high esteem and who serve as behaviour models. Examples are the organisation's founder(s), the secretary general, the employee of the week, a spiritual leader, and so on.

Layer 3 expresses the rituals or collective activities that are considered to be socially essential, but not strictly necessary for the organisation to function well. For instance, birthday ceremonies, religious festivals, family days, retreats, ways of greeting.

The **central part** of the onion represents the core values, i.e. principles and qualities that are felt worthwhile and important to adhere to, because they are believed to be good, right and desirable. They tell about what is considered normal and abnormal, natural or unnatural, good or bad, and so on. Example of core values are: participation of every person in discussions and decision-making, accountability to the constituency, etc..

18 Hofstede, Geert (1994) Cultures and Organizations. Software of the mind. Intercultural co-operation and its importance for survival. Harper Collins Publishers. London.



Handout D. Questions to fill in Hofstede's Onion.

Layer 1 Symbols. What words, pictures, or objects come to mind when you think of your organisation? What words, pictures, or objects distinguish your organisation from others? Do you feel that these are as representative of or appealing to female staff as they are of male staff?

Layer 2 Heroes. What persons - alive or dead, real or imaginary - or perhaps organisations, are seen as examples or role models for your organisation? What desirable characteristics do they embody? Are there also images of antiheroes or villains? Do you think that the heroes are as appealing to female staff as to male staff? Do they send out a message about sex or another kind of diversity?

Layer 3 Rituals. What work-related and social activities are typical of your organisation? Who participate in these activities? Are certain people excluded (unconsciously or intentionally) from these activities? Do you feel that it is possible for both male and female staff to participate in the activities?

Layer 4 Core values. What values your organisation adheres to are most important to you? Do you think they are shared by all staff? Do these values show sensitivity to diversity between people, such as sex, age, health or HIV status, and so on?



Assignment 7. Values and beliefs about leadership

Objective:	To make staff more conscious of prevailing norms and values about male and female leaders and change-makers committed to gender.
Participants:	all staff
Expected result:	Participants are aware of the implications of their beliefs, norms and values from a leadership perspective and what it implies for personal, professional and organisational growth.
Estimated duration:	About 1 hour
Method:	Debate in small groups, plenary exchange.
Materials required:	Flipcharts, markers; notebooks and pens.

Steps for the facilitator

Present a few statements which provoke a debate on different leadership styles. A few examples of such statements are:

1. Leaders and change-makers committed to gender mainstreaming are not authoritarian.
2. A good leader is someone who knows how to convince.
3. A leader knows when to talk and when to listen.
4. A leader enhances the capacities of others irrespective of their sex, race, health status, and other diversities.
5. Leaders are not necessarily visible in the organisation.
6. Women are better managers than men.
7. Female directors are better at managing conflict.
8. Young women should not lead older men and women.

Form groups of maximum 7 participants. Assign some statements to each group. If there are more than four groups give some the same statement. The participants have 20 minutes for discussion and consensus building, if possible. They write the arguments in their notebooks. In the plenary chosen representatives of the groups present the arguments that came out of the group discussion.

Let the plenary discuss the implications of the arguments presented for 1) staff members' growth into leadership roles and positions, and 2) the organisation to develop the participative formulation of programs based on a gender analysis. Pay attention to the accessibility of leadership positions for both women and men. Connect the arguments to beliefs, norms and values on qualities attributed to styles of leadership that are favoured.

3.5 Box 4

Procedures, systems and responsibilities

Assignment 8.

Exploring the gender dimension of an organisational division of tasks

Assignment 9.

Assessing responsibilities, procedures and systems, using a gender perspective

Assignment 8. Exploring the gender dimension of an organisational division of tasks¹⁹

Objective:	To assess the division of tasks inside an organisation.
Participants:	all staff
Expected result:	Participants are more aware of prevailing differences in responsibilities and tasks within the organisation and the beliefs, norms and values underlying them.
Estimated duration:	45 minutes
Method:	Guided discussion in groups, plenary discussion
Materials required:	Flipcharts and markers, notebooks and pens, copies of Handout E for all participants.

Steps for the facilitator:

Box 4 can be treated in two assignments. The first we present here can be used as a warming-up exercise to increase staff's understanding of the gendered nature of responsibilities, procedures and systems often perceived as 'gender-neutral'. In the second assignment the participants identify strengths and weaknesses related to organisational responsibilities, procedures and systems from a gender perspective.

Divide the group into small groups of about 3 participants. Distribute Handout E; it presents a table with a list of activities. The participants have to tick the prevalent situation in the appropriate column. In the last column they indicate if this situation has existed for quite some time or if it is a recent practice. The groups have 25 minutes for the exercise. Move around to clarify where necessary.

In the plenary ask the groups for their main observations. For the discussion you can use the following questions, which make it possible to explore the potential for change in the organisation:

1. Does the table reflect a certain division of the tasks and responsibilities?
2. Does the division of activities and responsibilities reflect the gender stereotypes held in your society?
3. Which beliefs about roles and relations of men and women supply the basis for this division of activities?
4. Do you observe tendencies towards change?

¹⁹ This assignment is inspired by Diaz Gonzáles, Olga Sofía (2001) Gender and Change in the Organisational Culture. GTZ.

Handout E. Who does what in the organisation?

Activities	women	men	Long-standing practice or recent development
Management of organisation			
Leadership in organisation			
Leadership in program work			
Decision-making at management level (org.)			
Decision-making at program level			
Secretarial work			
Financial administration			
General administrative work			
Handling information technology			
Doing research (if applicable)			
Cleaning			
Human resource management			
Organising celebrations and events			
Field work or work outside the premises			
Driving			
Extension (technical) work			
Social (assistance) work			
Other: ...			

Assignment 9. Assessing responsibilities, procedures and systems using a gender perspective

Objectives:	To dig deeper into the gender-sensitivity of responsibilities, procedures and systems. To share and discuss the outcomes of exchanges that have taken place in sub-groups.
Participants:	all staff
Expected result:	Participants have identified main strengths and weaknesses of their organisation related to responsibilities, procedures and systems using a gender perspective.
Estimated duration:	90 minutes (for 18 to 20 participants)
Method:	Merry-go-round
Materials required:	Flipcharts and markers, coloured cards, notebooks and pens, copies of Handout F for all participants.

Steps for the facilitator:

Cut cards in two colours for strengths and weaknesses. Prepare two flipcharts with the heading Responsibilities, procedures and systems, one for strengths and one for weaknesses. Introduce the assignment and explain what an organisation's responsibilities, procedures and systems are.

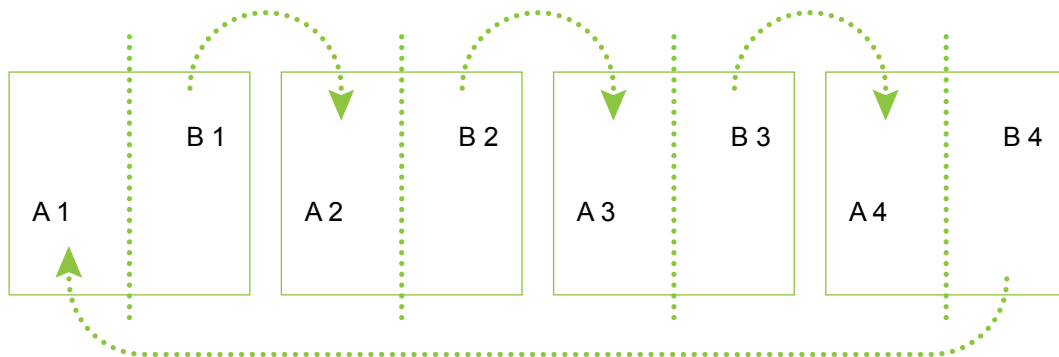
Preparatory group work

Divide the participants in groups of about 5 persons. Distribute handout F and invite them to go over the questions individually or in pairs (about 20 minutes). The participants write the responses to the questions in their notebook and determine if they are a strength or weakness of the organisation. They have about 20 minutes for this. A group discussion is then held to discuss the ideas about strengths and weaknesses. Does each strength or weakness apply to all staff or to certain individuals only? If perceptions differ within the group, they should try to find out why. After the discussion, the participants prioritise a maximum of three strengths and three weaknesses. Each of them writes the strengths and weaknesses, and the arguments in their notebook.

Merry-go-round method

- Split each group into two subgroups: A (hosts) and B (guests). A stays at the table where the group had its discussion and B interacts with the groups at the other tables in a clockwise direction.
- Each time subgroup B moves to another table, the new group that is formed shares the outcomes of both subgroups (two-way sharing).
- Each round of sharing takes a maximum of 20 minutes. The sharing should focus on main answers and arguments.

Figure 3. Procedure for four groups.



Step 1: All groups split into two: A and B

Step 2: The Bs join to the As next to their group

Step 3: After 20 minutes the Bs move clockwise to the next group, etc.

During the first exchange the hosts and guests try to agree on a number of strengths and weaknesses and write them down on cards. The cards remain at the table of the hosts. In the next exchange, the hosts and new guests discuss the cards and add other strengths and weaknesses based on the outcomes of the group discussion. The same procedure is followed until all the groups have shared their views.

In the plenary ask a representative of each group to paste the cards while explaining the content. If cards overlap, keep one and put the others aside. Make sure that the cards belong to box 4 of the 12-Boxes framework. If not, discuss in which other box they may fit better.

Handout F.**Responsibilities, procedures and systems**

1. Is clear responsibility (with ToR) assigned to a staff member or committee to co-ordinate gender-related actions in the organisation?
2. Is clear responsibility (with ToR) assigned to a staff member or committee to co-ordinate gender-related actions in the programs?
3. Has the organisation made adequate arrangements for a free flow and exchange of information and experiences on gender issues within departments and units, and between them? If not, why?
4. Are there systems in place to deal with discrimination, sexual harassment, and the like? If not, why?
5. Does the organisation have adequate procedures to ensure equal access to information, training, transport, payment for overwork, medical treatment, leave or sickness, and so on, for all our staff? If not why?
6. Are programs monitored and evaluated with qualitative gender indicators?
7. Do annual reports contain sex-disaggregated data?
8. Are efforts made to balance the number of male and female staff at all levels, such as affirmative action, setting quota, reducing female (or male) turn-over? If not, why?



Notes

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3.6 Box 5

Decision-making

Assignment 10.

Reflecting on organisational and programmatic decision-making, using a gender lens

Assignment 11.

Assessing the organisation's decision-making processes through a gender lens

Assignment 10. Reflecting on organisational and programmatic decision-making, using a gender lens

Objectives:	To understand why decisions concerning gender mainstreaming have or have not been taken. To learn more about the interconnections of decisions and their actual implementation.
Participants:	Management and program staff.
Expected result:	Participants have a deeper insight into the extent to which gender issues are put on the decision-making agenda and the extent to which a gender perspective is used when taking decisions.
Estimated duration:	90 minutes to 2 hours
Method:	Mind mapping in small groups, exchange in the plenary (Gallery Walk).
Materials required:	Flipcharts, markers of different colours, notebooks and pens, copies of Handout G1 and G2 for all participants.

Steps for the facilitator

In this assignment you employ the *mind mapping* method. Prepare a mind map using an example appropriate to the type of organisation (explanation and example are in handout G). You need one or two flipcharts for the map. Divide the participants in two or four groups of 4 to 6 participants each. One half of the groups focuses on decisions taken in the past that concerned the running of the organisation or programs and did not **explicitly** relate to gender issues – see questions under A in handout G1. For these decisions half of the groups identify the extent to which a gender perspective was used. The other half of the groups focuses on decisions taken in the past on gender issues in organisational or programmatic matters – see questions under B in handout G2. For those decisions the participants trace the actual implementation of those decisions. In case decisions on gender-related issues have never been made within the organisation, all the groups focus on the questions under A only.

Distribute Handout G1 and/or G2 and go over the steps to explain mind mapping. In case both management and program staff attend the exercise, put them in separate groups, one focusing on the running of the organisation, the other on the design and management of programs. Move around to assist whenever needed. After 60 to 90 minutes the groups paste the outcomes on a flipchart on the wall. In plenary the groups move from the flipcharts of one group to the next group, while a representative explains the mind map and the conclusions about questions a to e of the Handout (Gallery Walk). Ask the participants for their observations by comparing the outcomes. Summarise the outcomes from a gender mainstreaming perspective.

Handout G1. Mind mapping to learn about decision-making and gender mainstreaming - Management

A. General organisational and/or programmatic decisions

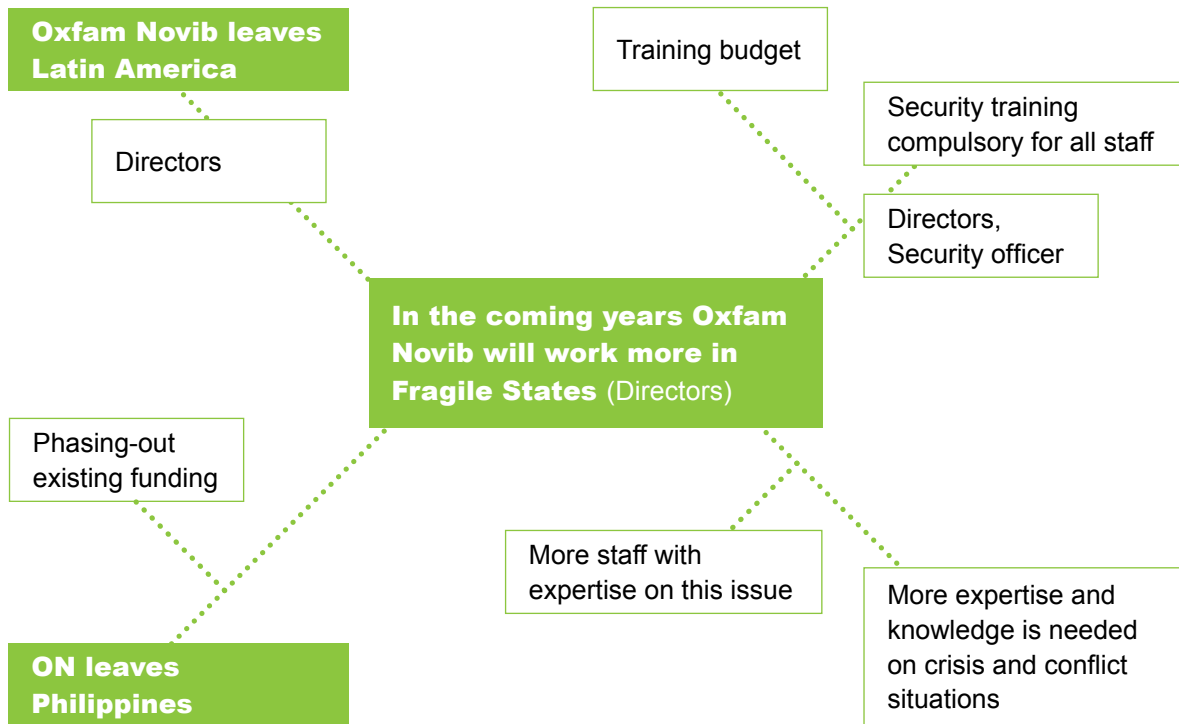
1. Choose an important decision made in the past on the running of the organisation or on the design and management of programs (for example human resources management, focus of programs in working area Y). Write this decision at the centre of a flipchart.
2. Identify about three choices made because of the decision taken. For each choice draw a line radiating from the centre of the diagram and write the choice on it.
3. Write next to each line the persons who made the choice, in co-operation with whom, (for example, 'the executive director with the financial officer', 'the program co-ordinators with representatives of the program participants').
4. For each choice think of about two or three smaller, more detailed decisions or choices made to be put into action. Draw secondary lines from the main radial line and write the decision or choice on it.
5. For each secondary decision or choice, write who were involved next to it.
6. Identify two or three critical factors that have helped in putting the main decision into action. Write them on the flipchart with a different colour close to the main radial line concerned.
7. Also, identify two or three important factors that were an obstacle to putting the main decision into action. Write them on the flipchart with a different colour close to the main radial line concerned.

When you have finished identifying the critical factors, reflect on the outcomes on the flipchart.

What conclusions can you draw regarding the following questions. Write your responses to the questions a - e in your notebook and on a flipchart.

- a. Have gender issues been considered in the decision-making? If not, why?
- b. Have the decisions, or will they have, a different impact on men and women (staff or program participants, depending on the decision chosen)? If yes, who may gain and who may lose?
- c. How equally was staff involved in the decision-making?
- d. What can be improved in the organisation's decision-making style to promote gender justice?

Example of Mind map

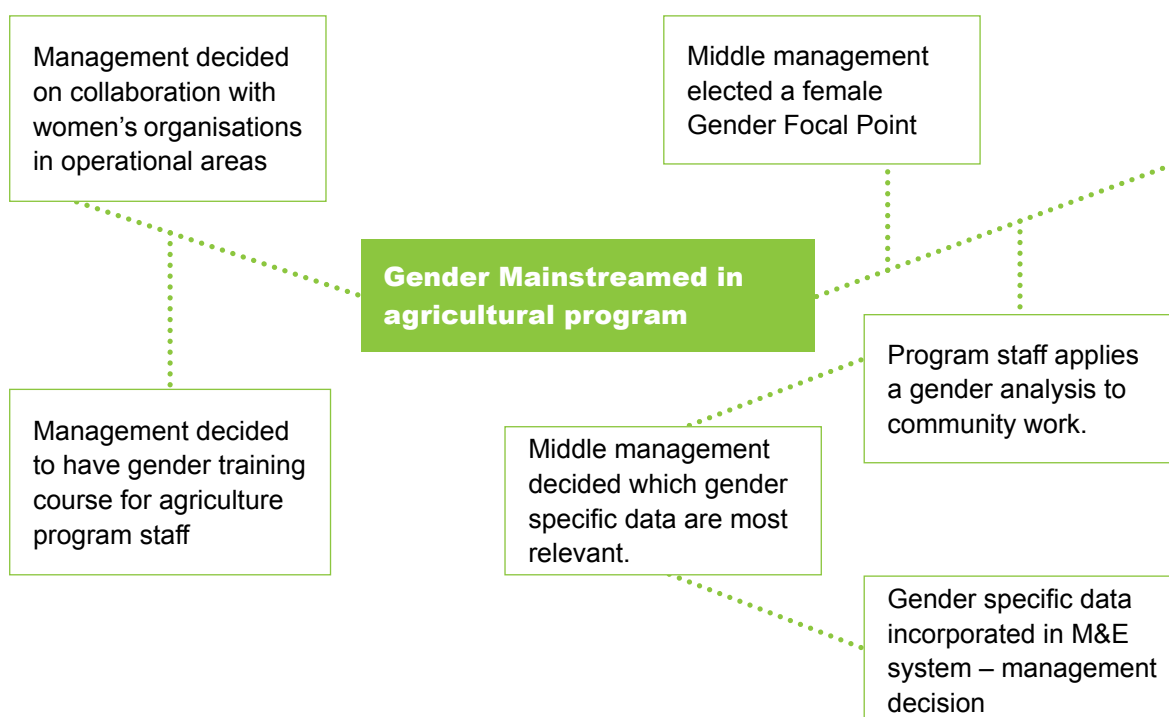


Handout G2.**Decisions on gender-related issues concerning the organisation and/or the programs – Program staff**

1. Write 'Gender mainstreaming decisions' or a more appropriate term in the centre of a flipchart.
2. Then follow the steps 2 to 7 of the questions under A.

When you are through, reflect on the outcomes on the flipchart. What conclusions can you draw concerning the following issues. Write your responses to the questions a to e in your notebook and on a flipchart:

- a. Whether or not important and relevant gender issues are sufficiently considered in the decision-taking. If not, what is missing? Why are they not taken up?
- b. Whether or not the decisions have, or will have, a different impact on men and women. Will it be different for diversities other than sex? If there is an impact, who (may) gain and who (may) lose? If not, why?
- c. How equally have staff members been involved in the decision-making process? You could think of sex and other diversities. Do you feel that their involvement is crucial to the process?
- d. What type of decisions have not (yet) been taken and why?
- e. What can be improved or done differently in the decision-making style of the organisation to promote gender mainstreaming?

Example of a mind map

Assignment 11. Assessing the organisation's decision-making processes through a gender lens

Objective: To assess decision-making processes on organisation and program matters, using a gender perspective.

Participants: Management and program staff.

Expected result: Participants have identified main strengths and weaknesses related to decision-making processes, using a gender lens.

Estimated duration: 80 to 100 minutes

Method: Fish bowl

Materials required: Flipcharts and markers, coloured cards, notebooks and pens, copies of Handout H1 + H2 for all participants.

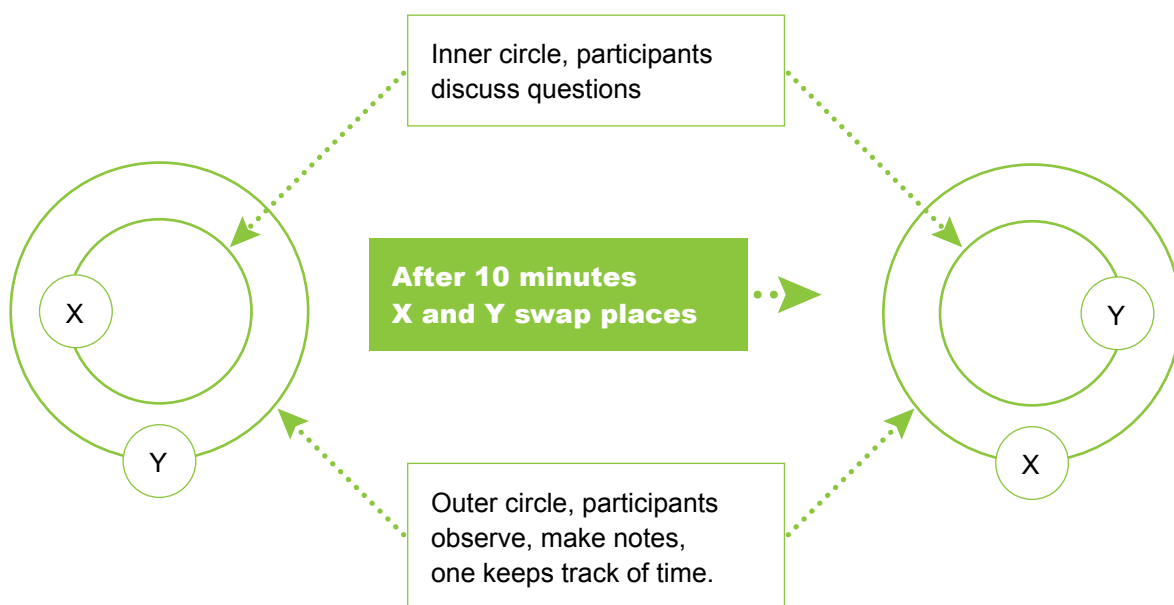
Steps for the facilitator

Cut cards in two colours for the strengths and weaknesses. Prepare two flipcharts with the heading Decision-making on the running of the organisation, one for strengths and one for weaknesses. If the workshop has a mixed group of participants (management and program staff together) you form two groups, one composed of management staff, the other of program staff. Ask the participants first to go over the questions in the handouts individually or in pairs for about 15 minutes. Then they start the fish bowl method of discussion (see explanation below). The group work takes 50 to 70 minutes. Move around to clarify questions if necessary. Ensure that everybody participates in the discussion and that the participants change place in time. In the plenary, all the groups place their cards on the respective flipcharts while comparing, discussing and combining cards that are similar. Here too, your task is to find out, using probing questions, if a strength or weakness relates to decision-making. If not, keep the cards aside to be used later on.

The fish bowl method

- Divide the participants into random groups of a minimum of eight and a maximum of fourteen participants.
- Each of these groups is then split into X and Y. Note: this method is not effective if X and Y have each fewer than four or more than seven participants.
- Subgroup X then sits in an inner circle, which is the discussion group, and Subgroup Y sits in an outer circle, which is the observer group, including one participant who is the timekeeper.
- Subgroup X discusses the questions in the handout for 10 minutes, determining if the answers to the questions at hand represent a strength or a weakness to the organisation, while subgroup Y observes listening to the discussion and taking notes.
- After ten minutes, subgroups X and Y swap places.
- Subgroup Y summarises X's discussion and revises the outcome, if the people feel it is necessary to do so. The group members then take the discussion forward from where subgroup X left off, proceeding with the next questions for 10 minutes.
- The two steps above are repeated at least twice more.
- In the end the two groups have written down three strengths and three weaknesses in clear and readable sentences on the cards in their respective colours.
- All the groups share their outcome in a plenary.

Figure 4. Fish bowl method of discussion



Handout H1.

Assessing an organisation’s decision-making processes through a gender lens - Management

1. Are gender issues discussed while making decisions on for example policies, planning, budgets, procedures, staff issues, programs, and so on? If not, why?
2. Are financial resources allocated to addressing gender gaps in the organisation? If not, why?
3. Are decisions on gender issues put into action as agreed upon? If not, what are the barriers?
4. Are conflicts related to gender issues effectively managed? (You can think of sexual harassment, working conditions, equal access to all sorts of training for men and women) If not, why?
5. Do male as well as female staff members have access to formal and informal decision-making processes? If not, why?
6. Are gender focal points and/or change-makers and leaders, who are committed to mainstreaming gender, actively involved in decision-making processes? If not, why?
7. Are the decisions taken on gender-related issues disseminated to all staff whenever relevant? If not, why?
8. Is there sufficient scope for staff to modify strategies and actions during implementation to ensure that gender issues are well addressed? If not, why?

Handout H2.**Assessing an organisation's decision-making processes through a gender lens – Program staff**

1. Are gender issues discussed while taking decisions in the different stages of program designing and management? If not, why?
2. Have funds been allocated for gender-related activities in the program budget?
3. Is there scope in the budget to undertake extra activities, if it appears necessary to address gender issues better (for example recruitment of extra gender expertise, research, training or consultancies)? If not, why?
4. Are decisions on gender issues put into action as agreed upon? If not, what are the barriers?
5. Are gender focal points and/or change-makers and leaders, who are committed to mainstreaming gender, actively involved in decision-making processes on program matters? If not, why?
6. Are the decisions taken on gender-related issues disseminated to all program staff as well as program participants whenever relevant? If not, why?
7. Is there sufficient scope for staff to modify strategies and actions during implementation to ensure that gender issues are well addressed? If not, why?
8. Is there scope to mitigate adverse effects for women or men due to program interventions? (You can think of potentially increased workload or social isolation, increased gender-based violence in families)? If not, why?



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3.7 Box 6

Co-operation and learning

Assignment 12.
Learning and Co-operation in the organisation

Assignment 12. Learning and Co-operation in the organisation

Objective:	To reflect on values related to learning and co-operation on gender issues.
Participants:	all staff
Expected result:	Participants have identified main strengths and weaknesses related to learning and co-operation with respect to gender justice.
Estimated duration:	90 minutes (for 18 to 20 participants)
Method:	Fish bowl or pyramid-building ²⁰
Materials required:	Flipcharts and markers, coloured cards, notebooks and pens, copies of Handout I for all participants.

Steps for the facilitator:

Cut two colours of cards for the strengths and weaknesses, both with the heading Norms and values about learning and co-operation, one for strengths and one for weaknesses. If you use the fish bowl method, you form two groups (A, B) or four groups (A, B, C, D), depending on the total number of participants. Distribute Handout I and explain its content. Ask the participants first to go over all the questions individually or in pairs, taking about 15 minutes. They then start the fish bowl (or pyramid-building). The groups discuss the questions, determining if one touches a strength or opportunity. They will have to select a maximum of three strengths and three weaknesses. They can formulate the strength as follows: we value..., we give high priority to ..., we strongly believe in; or for a weakness: we do not give priority yet to ...; we do not attach value to They make notes of their answers and arguments and write the strengths and weaknesses in clear and concise sentences on the cards in their respective colours.

Keep time and announce the rounds. Ensure that everybody participates in the discussion and that the participants join the other groups in time. Move between the groups, giving clarification if necessary. When they have finished the exercise, the groups in the plenary present what they have discussed. The two or four groups comment on each other's outcomes. Based on the reactions, make them draw final conclusions about the strengths and weaknesses and let them put the cards on the appropriate flipcharts. It is important that you probe to find out if a strength or weakness relates to box 6 – if not keep the cards aside to use later on (as in the previous assignment).

Note For reports of learning- and exchange workshops, see www.oxfamkic.org Community “Gender Mainstreaming and Leadership Trajectory.”

²⁰ The ‘Fish bowl’ method is explained in assignment 11. You can also use the method ‘Pyramid-building’. See assignment 19.

Handout I.**Assessing the organisational beliefs and values about learning and co-operation**

1. Does your organisation generate safe space to reflect, discuss and learn, and apply what is learned? If yes, why? If no, why not?
2. Does your organisation attach importance to sharing the views and ideas of all staff, irrespective of sex, health and HIV status, ethnicity and other diversities? If yes, why? If no, why not?
3. Does your organisation believe in team work to address gender justice issues? If yes, why? If no, why not?
4. Does your organisation value the input of change-makers or leaders committed to mainstreaming gender? If yes, why? If no, why not?
5. Does your organisation attach importance to learning and sharing about gender justice issues? If yes, why? If no, why not?
6. Does your organisation create opportunities (exchanges, training courses, enough time) for learning and co-operation?
7. Does your organisation organise exchange meetings with organisations or professionals with expertise in gender issues? If yes, why? If no, why not?
8. Does your organisation believe it is important to build partnerships with organisations or professionals with expertise in gender issues? If yes, why? If no, why not?



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3.8 Box 7

Program Design

Assignment 13.

Unpacking gender in the organisation's programs

Box 8

Influences on Program Design

Assignment 14.

Assessing the organisation's programs through a gender lens

Assignment 13. Unpacking gender in the organisation's programs

Objectives:	To ensure that a gender justice perspective is integrated in the programs, from analysis to monitoring and evaluation. People who are influential in the program design actively address gender justice issues
Participants:	Program and other staff with good knowledge about the programs.
Expected results:	Participants are more aware of two issues: a) the linkage between gender and the program foci, and b) the type of change in terms of gender roles and relations to which the programs wishes to contribute.
Estimated duration:	2 and a half to 3 hours (Explanation gender wheel: 30 minutes; group discussions: 60 to 90 minutes; merry-go-round: 60 minutes).
Method:	Group discussion, merry-go-round.
Materials required:	Flipchart, coloured cards and markers, notebooks and pens, copies of Handout J for all participants

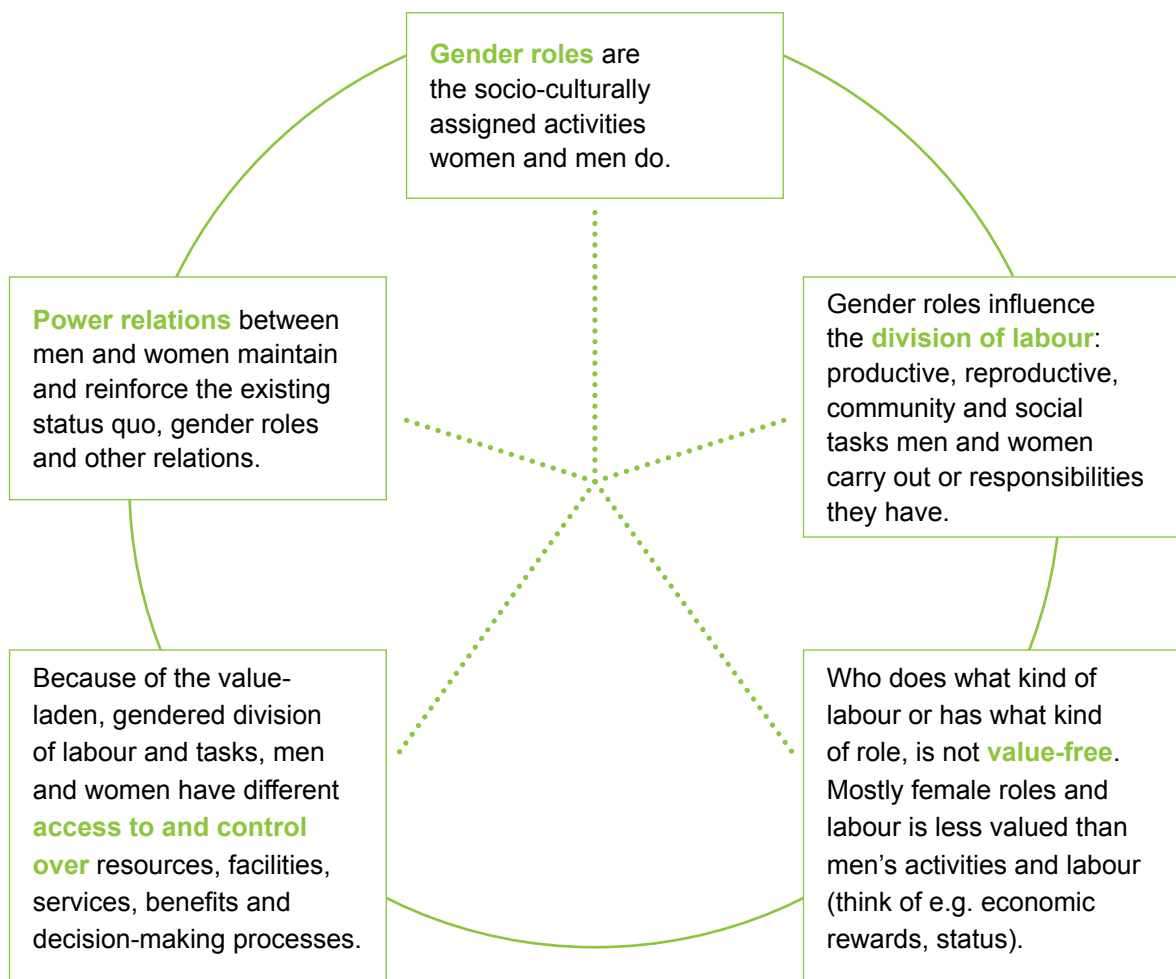
Steps for the facilitator:

Explain the relation between programs and gender mainstreaming. In Handout J you find a tool, the Gender Wheel, to examine an organisation's programs' gender-sensitivity and potential for change. The Gender Wheel is a useful instrument to increase staff's insight in the existing gender relations: "What is the existing situation?" The Wheel also helps in understanding the effects of programs on the different components and the possible limitations in the approach to bridging gender gaps. The tool is slightly adjusted from Parker's Gender Relations Analysis. This analysis is a systematic approach for assessing and understanding the different effects of development interventions on women and men because of their different gender roles and relations. It unpacks the gender concept into five key components: gender roles, gender division of labour, valuation of labour and roles, access and control over resources and power relations, which are all defined and influenced by culture and social processes.

All components are interrelated to each other like in a Wheel – see the figure in handout J. In any society men and women are given distinct roles, responsibilities, rights and identities. We speak of somebody's **gender identity** when we refer to these socially defined differences between men and women. They are rooted in widely shared ideas, beliefs and norms about: how men and women should behave and express themselves; the type of social and sexual relationships they should have; what are 'typically' feminine and masculine characteristics and abilities and what are their key virtues. These ideas, beliefs and norms reflect and influence **gender roles**, men's and women's positions in society and their respective status. Note that the ideas, norms and practices are subject to change, like a wheel rolling in a changing landscape, and that variations exist, for example, according to social class, ethnicity, age, time, culture and caste. The wheel may get punctured or a spoke may break, causing a shock and change of direction. A variety of factors (economic, social, political, legal, demographic, cultural) contribute to changes in the different components. Women and/or men play an active role in making change, in rolling or puncturing the wheel. Development interventions – on purpose or unintended - have an impact on the different gender components. Write down on a coloured card each element of the gender wheel as explained below. You will use them while explaining the wheel

1. Present the Gender Wheel using a flipchart and the cards you prepared.
2. After presenting the Gender Wheel ask the participants where they place their program in the wheel. Let them give examples of how roles and relations of men and women change(d) due to program interventions.
3. Form a maximum of four groups of participants. Ideally, each group should be composed of staff members who are involved in the same program. Distribute Handout J.
4. For each component of the Gender Wheel (gender roles, values, access to and control over resources, etc.) the participants discuss the questions that are specified in handout J. The participants write the answers in their notebook.
5. The groups exchange the results of their work through the merry-go-round method which is explained in Assignment 9. Each round of sharing takes a maximum of 20 minutes (time should be allocated equally to each group). The sharing should focus on the main answers and arguments.
6. In the plenary ask for the participants' main observations of the exchange and add your own.

Handout J. The Gender Wheel²¹



1. Has each component been explicitly considered in any stage of program implementation?
 - a) If yes,
 - In what way is the prevailing situation with regard to this component being challenged by the program(s)?
 - What are/were the visible changes in the situation of women and men, due to the program interventions related to this component (change in gender roles and the gendered division of labour, change in the value attached to activities women do, just and fair distribution of resources, benefits, power and leadership positions between the sexes)?
 - Are there any perhaps hidden, negative effects of the program(s) on the men and women concerned?

²¹ Adapted from Parker, R., I.A.Lozano, L.A. Messner (1995) Gender Relations Analysis: a Guide for trainers. Save the Children. New York: Women Ink.

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- b) If no, could the program(s) have negative effects with regard to this component?
2. To what extent will the changes that the program(s) set(s) in motion contribute to:
- The empowerment of women so they can freely take charge of their own lives and take (collective) action to solve their problems.
 - Changes in perception about the meaning of leadership and women taking up leadership roles?

Are you happy about the changes? What could be done better?

Assignment 14. Assessing an organisation's programs through a gender lens

Objective:	To identify strengths and weaknesses in the application of a gender approach, related to program design and management, and to processes of interaction in relation to programs.
Participants:	Program staff.
Expected result:	In the future the various steps, procedures and processes in program design are gender-sensitive. People who are involved in program design are gender-sensitive.
Estimated duration:	2 and a half hours
Method:	Group discussion with exchange in the plenary. Venn diagramming.
Materials required:	Flipcharts and markers, coloured cards, notebooks and pens, copies of Handout J1 and J2 for all participants.

Steps for the facilitator:

This assignment is divided into two parts: first the programs' design and management processes, and second the influences of various actors on program design and management. Cut cards for writing strengths and weaknesses using the same colours as in the other assignments. Prepare two pairs of flipcharts. Label them Program design and management and Influences on program design and management. One set of the flipcharts is for the strengths while the other is for weaknesses. Explain the difference between Program design and management and Influences on program design and management. The first part focuses on the design and management processes of the programs. It tries to answer the question "To what extent has a gender perspective been used in the various steps, procedures and processes?" The second part starts with a reflective exercise i.e. Venn diagramming. For both parts the participants are asked to identify the strengths and weaknesses from a gender perspective.

The first exercise analyses the decision-making process. Distribute Handout J1 and explain the procedure while going through the Handout. The participants continue working in the same groups as in the previous assignment. They first glance over the questions individually or in pairs. Based on the answers they think of strengths and weaknesses and write them down in their notebook. Because not all questions on the checklist may be relevant in their context, they do not have to restrict themselves to the questions in the handout: they can add other relevant items, if necessary. They have about 20 minutes to do so. They then discuss their ideas about strengths and weaknesses with others in the group. Does each strength or weakness apply to all staff members or to certain individuals only? If perceptions differ within the group, they should try to find out why; it could be due to differences in tasks, positions or personal situations. Based on the group discussion a maximum of three strengths and three weaknesses is prioritised. The strengths and weaknesses are written in clear and readable sentences on the cards in their respective colours. The participants make notes of the arguments. Afterwards the outcomes of the group work are shared in plenary and the cards are pasted on the appropriate flipcharts. Again, it is important to find out if a strength or weakness relates to the right box (7-8) – if not keep the cards aside to use later on.

The second exercise starts with the Venn diagramming exercise. Explain the method Venn diagramming:

- a. In the same groups as in exercise a, the participants list a maximum of 8 actors (such as, organisations, agencies, groups of participants, female leaders, consultants, networks and platforms, donors) that play a role in the designing, management and decision-making of your programs.
- b. Rank each actor regarding the importance he/she has for your programs in terms of their contribution to the processes of designing, management and decision-making (1, 2, 3, etc.).
- c. Rank each actor regarding the frequency of the contacts he/she has with your organisation (1, 2, 3, etc.).
- d. Take a flipchart and draw a circle in the centre to represent your program(s).
- e. Around that circle, draw circles representing each actor. The size of that circle should indicate its importance to your programs (see point b) and the distance to your circle the frequency of contact (see point c).
- f. Give the circle a blue colour when the actor uses a gender perspective in its work or focuses on gender equality and justice.
- g. Draw lines between the central circle and the other circles, indicating with arrows the direction of the contact or influence. It can be one or two-way communication.
- h. Write next to the lines what the contacts are about, for instance, giving information or advice on certain issues, funding, capacity building, providing services, and so on.
- i. Discuss your observations using a gender perspective.

The facilitator moves between the groups during their discussions and assists them in the Venn diagramming where needed. After the groups made the Venn diagram, handout J2 is distributed. It is possible to include a set of questions on decision-making; see assignment 11. If you do so, adjust the text of the assignment and the groups' make-up. Now the same procedure is followed as in the first part of the assignment. The groups select a maximum of three strengths and three weaknesses and the cards are pasted on the respective flipcharts.

GMLT and WEMAN When a Microfinance Institution is assessed, the combination of GMLT and GALS methods can ensure a better understanding of and ability for dealing with non-financial challenges (social or cultural) of both women and men, in such a way that it facilitates the linking of practical needs to the more strategic interests of both parties involved. Combining GMLT and WEMAN may encompass an organisational assessment that includes field visits to help staff members understand and incorporate the views of women and men at the community level in the gender capacities being analysed. The challenge could be the ability of counterparts to use participatory processes beyond the collection of data. This challenge provides an opportunity for staff members to enhance their analytical skills and at the same time, learn better to recognise communities as partners, reducing the level of power that the former holds over the latter.

Since the GMLT is supposed to contain learning events, community members could support that by developing the capacity of staff when the GALS tools are used during the field visit. That means that prior to the GMLT the facilitator of the process should have space to work with community members who will learn the different tools and diagrams, considered important for the counterpart to learn about the key issues regarding gender justice and women's human rights at the community level. All staff members participating in the GMLT should have the opportunity to participate in the fieldwork. Two field visits could be done: one to look at gender-related women's human rights issues, which would lead to the identification of challenges, which will then be used in the second field visit to work on the challenges tree and possible solutions, up to the point of defining responsibilities by the community and by the counterpart (See Discussion paper. Gender Action Learning System (GALS) & Gender Mainstreaming Leadership Trajectory. Working together for engendered Micro Finance Institutions (MFI). By Fawzia Khondker Eva and Helena Zefanias Lowe, Nairobi 2010. Draft.).

Handout J1.**Program design & management**

1. Is the design of the programs based on a gender analysis, including the role division between men and women, the different needs, problems and opportunities of (different categories²² of) women relative to those of men (see elements in gender wheel)? If not, why?
2. If the answer to question 1 is yes, are the results of this gender analysis reflected in the key issues addressed by the program? (For example: appropriate technology packages, messages and technologies for both men and women; or a program on market access that concentrates on crops primarily grown by female farmers)? If not, why?
3. Are women explicitly mentioned as program participants, having their specific (practical) needs and (strategic) interests? If not, why?
4. Do the program's objectives reflect gender equality issues? If not, why?
5. Do the programs aim at the promotion of women's (transformative) leadership?
6. Do the programs include activities for female and male program participants to promote sensitivity to and capacities on gender issues? If not, why?
7. If male staff cannot approach women because it is culturally inappropriate, has the project made provisions to recruit or involve female staff? If not, why?
8. Does the monitoring and evaluation system include indicators on gender equality?
9. Are sex-disaggregated data collected? If not, why?

²² Categories can be based on age, level of education, ethnicity, religion, class, caste, health/ HIV status, and the like.

Handout J2. Influences on program design and management

1. Are the project participants (men and women) in the areas where you operate consulted in the different steps of program design and decision-making? If not, why?
 2. Can women and men living with HIV express their problems, needs and opportunities in relation to program design? If not, why?
 3. Are female and male leaders, who are committed to social change, consulted during the program design? If not, why?
 4. Are external agents with expertise on gender and women's issues consulted during the program design? If not, why?
 5. Are co-operating organisations or institutions and funding agencies aware and supportive of efforts aimed at addressing gender issues? If not, why?
 6. Are there mechanisms for program participants to complain about harassment by and violence from program staff? If not, why? If yes, do they access these mechanisms?
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3.9 Box 9

Program Work

Assignment 15.

Understanding gender and related concepts

Box 10

Staff Capacity and Expertise

Assignment 16.

Assessing the organisation's staff capacities and expertise to translate a gender approach into programs

Assignment 15. Understanding gender and related concepts

Objective:	Creation of awareness of existing understanding and possible gaps in knowledge and insights about gender justice. Identification of strengths and weaknesses related to staff capacities and expertise on gender.
Participants:	All staff
Expected result:	Participants have a common understanding of the meaning of gender and related concepts, eventually adapted to the local context and language.
Estimated duration:	1 to 2 and a half hours (for 18 to 20 participants), depending on the number of selected concepts and the level of knowledge of the participants.
Method:	Agree-Disagree game.
Materials required:	Flipcharts and markers, notebooks and pens, handout K. Optional: copies of a list of definitions of gender concepts.

Steps for the facilitator:

Select the key gender concepts that are relevant to the organisation and its work (gender equality, gender justice, gender mainstreaming, transformative leadership, empowerment). You may make a list of them, which can be taken from Annex 1 or from other books or web-sites, and distribute it at the end of the exercise. Alternatively, you can make a list after the assignment, based on the working definitions that are the result of the discussions, and distribute it later on. Then, make statements which should provoke discussion among the participants about the various selected concepts. You may want to use some of the statements given in handout K.

Explain the purpose of the Agree-Disagree game. In this game the participants are asked to stand and move in the room. You will give a statement, after which those participants who agree move to the right and those who disagree move to the left. Those who cannot decide or are neutral stand in the middle. The three groups share their arguments and come up with counterarguments. They can change side when they change view. When sufficient arguments have been shared, summarise the discussion and/or come up with a shared working definition on certain key concepts that arose from the exchange. You can write it on a flipchart. Then, give a next statement and so on, until you feel that all the concepts have been sufficiently discussed. If the game takes too long, let the participants sit down and continue the discussion in the plenary using flipcharts.

Alternative methods

- Prepare small cards with short definitions of certain core concepts related to gender justice. Fold the cards and distribute them among the participants. The participants work in pairs and discuss what the concepts are about. After 10 to 15 minutes the participants share their opinions and views in the plenary and the other participants can then add their views. Use a flipchart to summarise the key points of each concept and come up with a shared working definition.
 - Make a multiple choice questionnaire with possible answers about gender and related concepts. Distribute them among the participants to fill out anonymously and collect in the questionnaires when the participants are done. Redistribute the questionnaire randomly and discuss each question. This redistribution may help to open up the discussion in case the participants are too shy to give their opinions.
-

Handout K.**Possible statements for Agree-Disagree Game**

1. The best strategy for empowering men and women is to form and strengthen mixed self-help groups.
2. If we educate boys and girls the same way, the differences in gender roles will disappear.
3. Men should have more time to care for their children.
4. NGOs should respect cultural practices prevailing in the area in which they operate.
5. A woman who is beaten by her husband has the right to chase him out of the house.
6. Women who are HIV positive should not have children.
7. Gender justice is about just economic conditions for men and women, so they can live their lives in dignity.
8. NGOs should give priority to satisfying immediate, practical needs of female and male project participants, instead of addressing women's disadvantaged position.
9. Gender mainstreaming in programs means incorporating female participants in decision-making at all levels.
10. Men deal better with technical issues, women are more suited for secretarial tasks.

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Assignment 16. Assessing an organisation's staff capacities and expertise to incorporate a gender approach in the programs.

Objectives: To arrive at an overall assessment of an organisation's strengths and weaknesses related to staff capacities and expertise on gender-related issues.
To assess staff capacities and expertise from a gender perspective.

Participants: All staff.

Expected result: Participants have identified the main strengths and weaknesses of their organisation with regard to its staff capacities and expertise on gender and related issues.

Estimated duration: 100 minutes (for 18 to 20 participants).

Method: Discussion in groups of 4 to 5 staff members with plenary exchange.

Materials required: Flipcharts and markers, coloured cards, pens and notebooks, copies of Handout L for the participants.

Steps for the facilitator

Cut two colours of cards. These cards will be used to write strengths (one colour) and weaknesses (other colour). Prepare two flipcharts with the heading Staff Capacities and Expertise, one for strengths and one for weaknesses. Select and modify the guiding questions in Handout L and, if needed, add questions. Ensure that the guiding questions are relevant to the situation and nature of the organisation and to the staff participating in the assignment, distinguishing different categories of staff.

After the discussion about gender and related concepts in the previous assignment, the participants now focus on their organisation. To what extent do they feel that staff members in different positions and performing different functions have the knowledge and understanding to address gender-related issues in the organisation and in the work they do? The participants are asked to identify what the organisation is doing right and what it can improve.

Divide the participants into random groups of four or five (but composed of the same staff category in case you conduct a mixed workshop). Distribute Handout L and go over the text to ensure that the assignment is clear. Emphasise that the questions are meant to guide them and that they do not need to be thoroughly answered one by one. Group work (about 50 minutes). The participants first go quickly through the questions, individually or in pairs. They then discuss a number of questions that help them come up with three strengths and three weaknesses per group. Does each strength or weakness apply to all staff members or to certain individuals only? If perceptions differ within your group, then try to find out why. It could be due to differences in tasks, position or personal situation. The participants prioritise a maximum of three strengths and three weaknesses and write them down in clear and readable sentences on the cards in their respective colours.

Plenary exchange (about 30 minutes). In the plenary, discuss the outcomes of the different groups. First, ask each group to read its cards with strengths. Cluster the cards where possible. Discuss whether the participants agree or disagree. Put together the ones they agree on and the ones they disagree on. Repeat for the cards on weaknesses. It is important to probe to find out if a strength

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or weakness relates to staff capacities and expertise or to another organisational issue; it may fit better into another box which will be discussed later on. Keep apart the cards that do not fit in box 10, to be classified later on.



Handout L. Assessing staff capacities and expertise on gender-related issues

Staff capacity and expertise on gender- related issues

Management

1. Does management have knowledge and understanding of gender related issues? If not, why?
2. Does your organisation regularly make efforts to strengthen and update staff knowledge and skills in the area of gender?
3. Are staff's capacities in gender issues discussed during performance appraisal interviews?
4. Is a budget made available for gender mainstreaming in the different departments and/or programs?

Program staff

1. Are program staff members capable of designing and implementing programs in such a manner that the practical needs and strategic interests of both women and men are addressed? If not, why?
2. Do program staff-members feel confident and capable to discuss HIV and gender-related issues in their work area? If not, why?
3. Is program staff open to learning and to looking beyond their own perceptions and assumptions? If not, what is needed to improve these abilities?
4. Does program staff sufficiently understand what is needed to promote women or transformative leadership? If not, why?
5. Do program staff members have the skills to address diversities (sex, age and other identities, health/ HIV status)? If not, why?
6. Are staff members prepare to seek actively women's participation and leadership while designing and implementing the program? If not, why?

Support staff

1. Does support staff have knowledge and understanding of gender related issues? If not, why?
 2. Is special training on gender justice offered to support staff?
 3. Does support staff have knowledge and understanding of how gender roles and relations may impact on the type of work they do, the position they have and the opportunities provided to them? If not, why?
 4. While addressing HIV and AIDS related issues, do support staff members take into consideration the different susceptibilities of men and women? If not, why?
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3.10 Box 11

Room for manoeuvring

Assignment 17.

Willingness and openness of staff to address gender-related issues

Assignment 18.

Assessing staff members' space to do their work and their commitment to addressing gender issues

Box 12

Attitudes

Assignment 19.

Reflecting about one's own beliefs, behaviour and attitudes related to gender stereotypes

Assignment 17. Willingness and openness of staff to address gender-related issues

Objectives:	To reflect on the level of staff members' willingness to address gender issues
Participants:	Management staff and program staff
Expected result:	Participants are more aware of the level of willingness and openness of staff members to address gender justice issues.
Duration:	35 minutes.
Method:	Discussion in pairs with plenary exchange.
Materials required:	Flipcharts and marker, copies of Handout ²³ M1 for management staff and M2 for program staff.

Steps for the facilitator

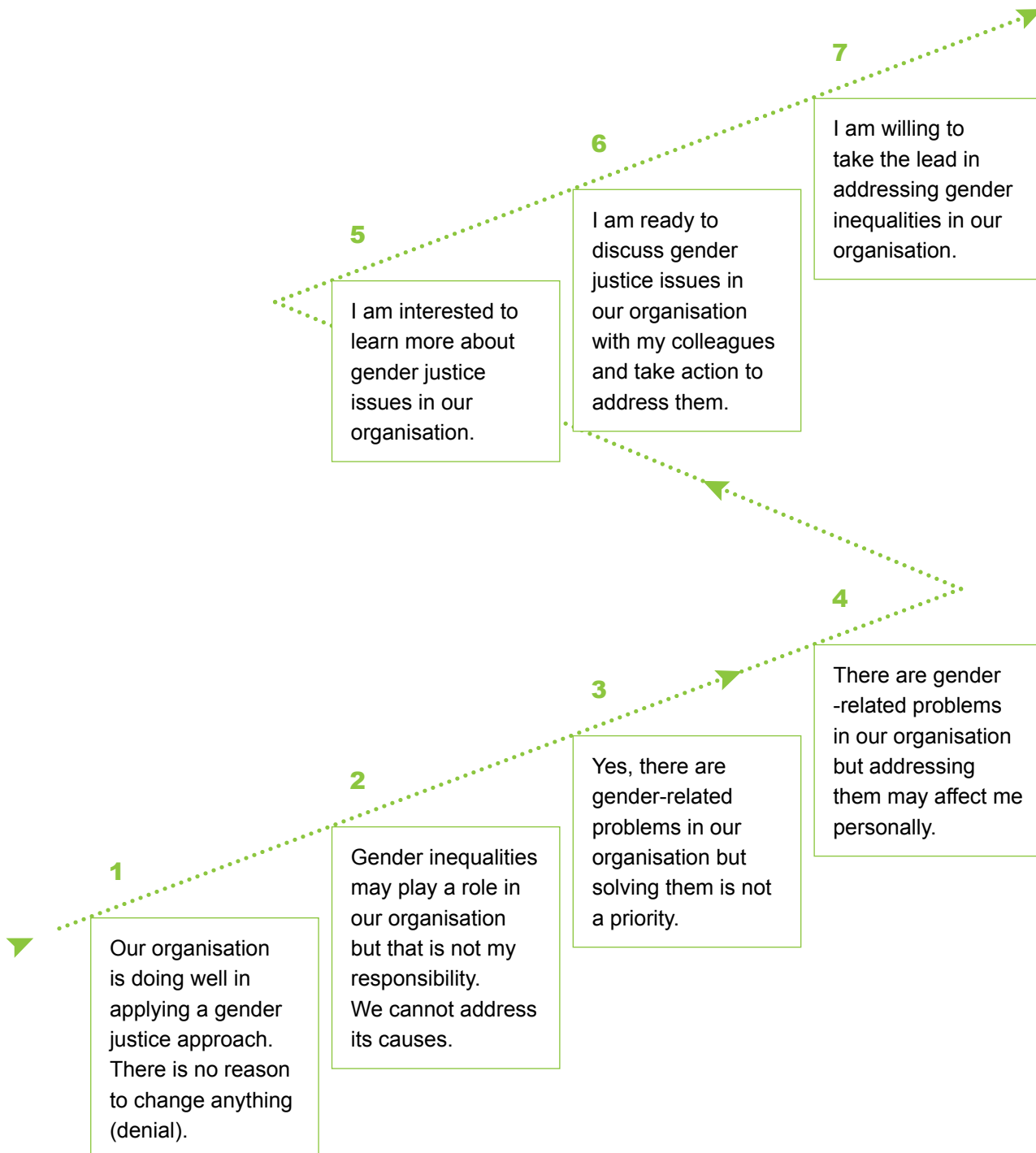
Check the appropriateness of the Handout for the staff category concerned and adjust where required. Handout M1 is primarily meant for management staff and M2 for program staff, though you may consider using the two handouts with both groups. Explain the use of the Handout(s). It shows a continuum of responses about addressing gender issues in the organisation and/or programs. Ask the participants to

- a. Give a rough estimate of the number or percentage of staff members in the organisation (or unit) who fall within each response of the continuum. Some staff members may be resistant; others are motivated to various degrees. For example, "most of our staff shows response 3, 4 and 5".
- b. Give one or two reasons why individuals or groups of staff members would be open or closed to addressing gender issues for each of the types identified. For example, "Response 3: staff feels uncertain because they do not know where the change will lead to; Response 4: personal career plans may be affected negatively".

Ask the participants to work in pairs (of the same staff category). Give them 20 to 25 minutes for the assignment depending on the size of the organisation or the unit concerned. Emphasise that it is a quick scan.

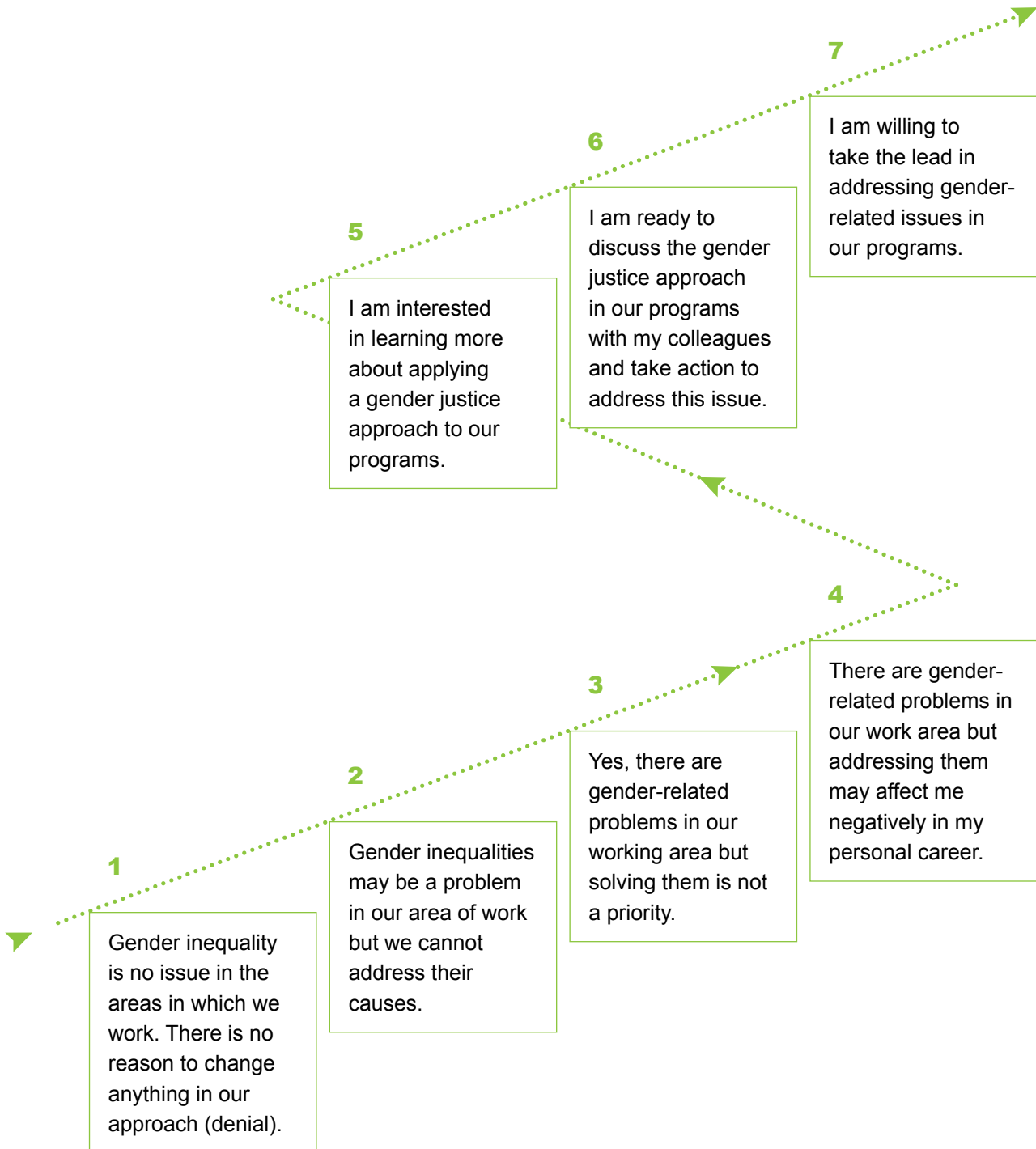
In the plenary, ask participants to share the major observations. What types of responses are mentioned? What reasons are most common? What insights did the participants gain?

²³ Adjusted from SARAR Resistance to Change Continuum in Srinivasan, L (1990) Tools for Community Participation: A Manual for training trainers in Participatory techniques. New York: PROWWESS/UNDP. p.62

Handout M1**(management staff)
Continuum of willingness and openness to
address gender issues**

Handout M2

**(program staff)
Continuum of willingness or openness to
address gender issues**



Assignment 18. Assessing staff members' space to do their work and their commitment to addressing gender issues

Objective:	To identify strengths and weaknesses of the organisation in terms of staff's commitment and space to do the work related to gender justice.
Participants:	All staff.
Expected result:	Participants have identified main strengths and weaknesses of their organisation with regard to its staff members' commitment and space to do their work related to gender justice.
Estimated duration:	2 hours (for 18-20 participants).
Method:	Discussion through pyramid-building.
Materials required:	Flipcharts and markers, coloured cards, notebooks and pens, copies of Handout N for the participants.

Steps for the facilitator

Cut cards for writing strengths and weaknesses. Prepare two flipcharts with the heading Staff Commitment, one for strengths and one for weaknesses. In addition, you need two flipcharts with the heading Space to do one's work, again one for strengths and one for weaknesses. Explain the difference between Staff Commitment and Space to do one's work.

Explain the method of pyramid-building for the number of participants present - see below. In case you conduct the exercise with different categories of staff, separate the program staff, who will work with a specific set of questions. The participants receive handout N with questions about commitment and another set of questions about space to do one's work. If the group is smaller than 16, all participants will go over the two sets of questions, using the method called pyramid-building twice. They identify three strengths and three weaknesses for each issue and write the outcomes on cards. If the group is larger than 16 participants split it into two. The participants in one half of the group go over one set of questions, those in the other half deal with the second set. Each group comes up with three strengths and three weaknesses using pyramid-building, which they write down on the cards. In the plenary the groups exchange the outcomes and comments on each other's strengths and weaknesses.

Distribute Handout N, explain its content and emphasise that the questions are meant to guide them in the identification of strengths and weaknesses and that they do not need to be thoroughly answered one by one. First give the individual participants 20 minutes to go over the questions.

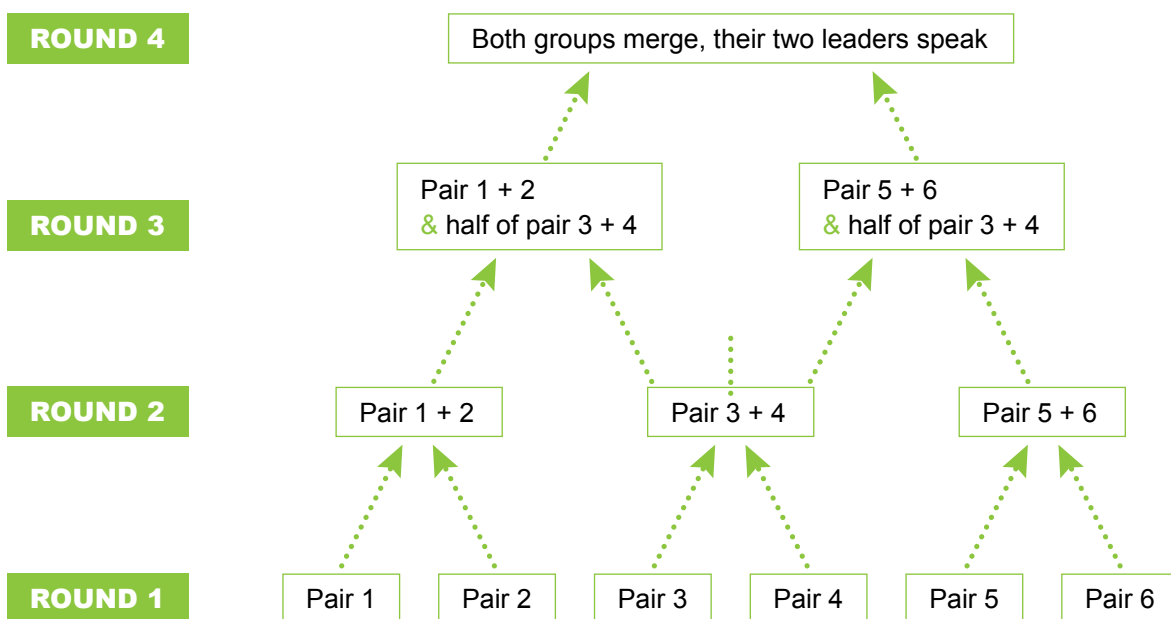
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Explain the pyramid discussion method. Draw the round-by-round process on a flipchart for a proper understanding. Form the pairs for the first round. It is advisable to put the same staff category together for this first round and perhaps the second round. The pyramid discussion follows (about 45 minutes). Keep time and announce the subsequent rounds. Ensure that everybody participates in the discussion and that the participants join others in time. Move between the groups, giving clarification if necessary. In case the group was not split up in two, repeat the exercise for the second set of questions. When the participants conclude the pyramid-building exercise they paste the cards on the flipcharts concerned. Find out if a strength or weakness relates to box 11 – if not keep the cards aside to use later on. In case the group is split up in two, the groups first comment on each other's outcomes and come to a consensus about the strengths and weaknesses. They then paste them.

.....

The pyramid discussion method

- This method is called 'pyramid-building' because it starts with a large number of pairs of people, which gradually merge to form fewer groups, until you have just one group involving everyone (the apex of the pyramid). The method works with a minimum of 8 people.
- The maths depends on the number of participants. However, for each set of questions you aim for four rounds of discussion, beginning with pairs and ending with everyone for that group discussing, and hopefully agreeing, together. We give an example below of 24 participants, divided into two groups of 12, group A and B.
- **Round 1.** Participants first discuss the questions in pairs for 15 minutes. In our example below there are six pairs for group A and six for Group B. Each pair decides who will be the leader in the next stage.
- **Round 2.** Each pair then joins up with another pair to form groups of four. In our example: trios of four for group A and the same number for group B. They discuss for 10 minutes. The two leaders discuss – if the other two participants want to say something, they do it through their leader. The aim is to arrive at a consensus. The discussion groups decide on a leader, preferably a participant who has not been appointed yet, for the next stage.
- **Round 3.** In the next round one team in group A and one team in group B split up and joins the team of four. The same procedure is then followed. We have now four discussion teams of six people each, with two leaders each. They repeat the process with the two new leaders leading the discussion, for a further 10 minutes. Each team then elects a single leader for the following round.
- **Round 4.** Then, the two groups of six people come together to form a single group A and a single group B (each with 12 people). They have another 10 minutes in which to arrive at a consensus, discussing as before through the two leaders. They assign one last leader to discuss and compare the outcomes with the other group.
- **Finally,** the two leaders of group A and group B sit together and arrive at a consensus on the issues at hand.



Handout N.**Assessing staff members' space to do their work and commitment to addressing gender issues**

Freedom or space to do one's work

1. Is there (enough) space and opportunity in the organisation for all staff, irrespective of their level and function, to discuss openly relevant gender-related issues on the workplace?
Examples are: balancing work and family responsibilities, career opportunities, access to facilities, problems at work and in personal life. If not, why?
2. Are good performances of both male and female staff recognised and rewarded equally? If not, why?
3. Does management give space to staff members who take initiatives to address gender issues and gaps? If not, why?
4. In case a gender focal point has been appointed, does he/she have the resources to do his/her work? If not, why?
5. Do staff-members feel (men and women alike) that they work in a safe working environment that enables them to carry out their work (irrespective of their health or HIV status, race, and other diversities)? If not, why?
6. Do employees, irrespective of their sex, health or HIV status, age and other diversities, have equal access to facilities, transport arrangements, medical services, training, promotion, and decision-making? If not, why?
7. Do women leaders in the organisation have the same space to lead as men, in spite of possible differences in leadership style?
If not, why?

Beliefs and attitudes of staff

1. Are male and female staff members willing to talk openly about gender-related issues in the organisation? If not, why?
2. Are staff members convinced that gender issues and gaps need to be addressed – both in the organisation and in the programs? If not, why?
3. Is there enough motivation among staff to address HIV and gender issues together whenever relevant? If not, why?
4. Are staff members contributing to reducing stigma and discrimination in the work place based on sex and other identities, health or HIV status? If not, why?
5. Do all staff members believe that sexual harassment and abuse (in general and in the workplace) is unacceptable? If not, why?
6. Do staff members believe that both men and women can be change agents and leaders irrespective of differences in style of leadership? If not, why?

Assignment 19. Reflecting about one's own beliefs, behaviour and attitudes related to gender stereotypes.

Objective: To promote self-reflection among staff on their own beliefs and attitudes.

Participants: All staff.

Expected result: Participants are more aware of their own beliefs, behaviour and attitudes related to gender stereotypes.

Estimated duration: 20 minutes

Method: Thumbs up game.

Materials required: Statements for thumbs up game.

Steps for the facilitator:

Ask the participants to close their eyes and relax. Read the statements (see box below) slowly and let the participants put their thumb up (when they agree with the statement) or downwards (when they disagree) or horizontal (when they are neutral). At the end, ask how the participants felt about the exercise. Invite them to share some of their observations and – depending on the time available – ask if they want to discuss one or two statements.

Thumbs up game

(15 minutes)

Possible statements

1. Women are too emotional to become good leaders.
2. Women should be blamed for being raped if they walk alone outside the village premises, or if they wear short dresses or tight jeans.
3. Women have the right to say “no” to sex.
4. Men are not as good as women in caring for children.
5. HIV-positive people must have loose morals.
6. Young girls’ and boys’ sexual rights should be recognised and protected.
7. It is too difficult to find capable women who can take up leadership positions.
8. A man can never work under a female boss.
9. The pressure on men always to be the breadwinner is hard to live with.
10. Women are terrible drivers.



Notes

A large area of horizontal dotted lines for taking notes.



3.11 Final sessions for all staff

Assignment 20.

Combining the results of the self-assessment

Assignment 21.

Mapping a journey to your desired gender-sensitive organisation and program

Drafting the Action Plan

Assignment 22.

Priority setting and action planning

Assignment 20. Combining the results of the self-assessment

Objectives:	To reflect on the process and outcomes of the discussions on the gender competence of the organisation and its programs. To enable the participants to understand how the assessment fits into the 12-Boxes framework. To increase staff members' insight in the interconnections between the twelve boxes.
Expected result:	The participants have come to a consensus about prioritised strengths and weaknesses of an organisation and its programs with regard to the application of a gender justice approach.
Estimated duration:	If the different categories of staff have (mostly) worked on the strengths and weaknesses in mixed settings: 2 hours If the different categories of staff have worked in separate settings: 3 and a half hours
Method:	Carousel
Materials required:	The flipcharts with strengths and weaknesses produced during the different assignments; coloured cards to adjust or add strengths and weaknesses; markers.

Steps for the facilitator

It is good to start this assignment with a summary of the assignments you have done so far. You can use the flipcharts with the strengths and weaknesses to bind the discussions together and show the different elements that have been assessed. You take all the flipcharts with strengths and weaknesses produced, and order them according to the four 'pillars' of an organisation: Mission and Mandate, Organisational Structure, Programs, and Human Resources. Put the flipcharts together on the floor or paste them on the wall in four different corners of the room. Put the flipcharts with 'cards to be put up later on' also somewhere in the room. If the different staff categories have worked in separate settings, you do the same, but you indicate the staff category that made the flipcharts. Since this assignment is rather 'heavy', prepare one or **two energisers** and a **good break** in between the rounds.

Form four groups of mixed composition and assign a set of flipcharts to each one of them. Emphasise that this is one of the most important steps in the self-assessment in order to bring out a good set of recommendations for the future. The groups follow the Carousel method. This is a variation on the merry-go-round method (see assignment 9).

The Carousel exchange and discussion method

1. In the first round the group discusses each strength and weakness of the set of flipcharts assigned to them. They assign a leader to guide the discussion. The leader should ensure that everybody expresses his or her views. Each group also selects one or two members to explain the results of the discussion to other groups. In the group the participants:
 - All agree on a strength or weakness –the card then remains on the flipchart. If people feel they have to re-phrase the strength or weakness, they take a new card to do so.
 - They all disagree – then remove the card and paste it on a new flipchart under the heading: 'deleted with consensus'
 - Some of them agree on a strength or a weakness, others not – then remove the card and paste it on a new flipchart under the heading: 'minority point of view'.

The groups have 30 minutes for this round.

2. In the second round the group members, who are not the presenters, move clockwise to the next set of flipcharts. They listen to the presentation of the former group, ask questions, give comments, and so on. They discuss the strengths and weaknesses as the others had identified. Again, they keep some cards where they are, they may want to add a card to the cluster or paste a better-phrased card. They may also want to shift cards to the flipcharts with the heading: 'deleted with consensus' or 'minority point of view'. This round takes 20 minutes.
3. In the third and fourth round – both again 20 minutes - they repeat the procedure for the other two sets of flipcharts.
4. In round five, the groups are back where they started. They will see changes due to the inputs of the other groups. They discuss the changes and put all the (re-phrased) agreed cards together. They keep the minority points of view on a separate flipchart and delete the cards they all disagree on. This round takes about 15 minutes.

The disadvantage of this method is that the presenters do not learn about the results of other groups. To make up for this, the presenter could swap place with another group member halfway the carousel in order to take part in the exchange. If the different staff categories have worked in separate settings, logically the first step in this assignment is to compare the outcomes per category and to come to a consensus where possible. As indicated, sufficient time has to be reserved for this step.

When the groups are done, they paste all the flipcharts together according to the boxes of the 12-Boxes Framework. Although there are many ways to explain the Framework, experience teaches that building the framework step by step, by going through the different assignments and boxes, is a good way of working. In the plenary ask the participants to share some main observations about the process of comparing and building consensus and about the outcomes. Pay special attention to the flipchart with the heading 'minority point of view'.

Assignment 21. Mapping a journey to your desired gender-sensitive organisation and program

- Objectives:** To make a vision of a gender-sensitive organisation and -programs. To reflect on the strengths and weaknesses of all the twelve boxes of the Framework and come up with areas for improvement.
- Expected result:** Participants have drawn the path of the journey towards the vision of an organisation that has mainstreamed gender in its organisational and programmatic matters. They have identified internal and external favourable and unfavourable factors and/or actors along the road.
- Estimated duration:** 90 minutes
- Method:** Visualising through drawing
- Materials required:** Flipcharts or brown paper, markers of different colour, coloured paper and cards, notebooks and pens, scissors, tape, glue.

Steps for the facilitator

The facilitator presents the 12-Boxes Framework as elaborated in the previous assignment. This helps in getting an overview of where the organisation stands today in its efforts to make the organisation and programs more gender-sensitive. It makes clear that gender mainstreaming requires a holistic approach in which all elements have to be considered in their inter-relationship. The participants will see that they have produced a full picture of the organisation's gender competence and the gaps that may need to be addressed.

Looking back on the strengths and weaknesses in the 12 boxes, the participants will reflect on issues where they want to see improvement. However, such a reflection requires a clear vision about the type of organisation the NGO wishes to be in terms of gender justice. If staff has elaborated a vision of a gender-sensitive organisation and programs (Assignment 3: Visioning a gender sensitive organisation and programs), take the drawings of that assignment. If you had skipped that assignment you can now invite the participants to reflect on a future end station of gender mainstreaming for the organisation.

If produced earlier, put up the flipcharts showing the visions of a gender-sensitive organisation and gender-sensitive programs. Form groups of maximum 7 staff and invite them to go around and have a good look at each other's drawings. They discuss what they like most in the different drawings and list these elements on a flipchart. They can also select one favourite drawing and if they wish they can add a few items from other drawings to improve it. Along the road towards the end station they indicate organisational strengths that will help them move ahead and organisational weaknesses (stumbling blocks) that will hinder them.

If the group has not done the exercise of building a vision before, the different groups discuss first what they would wish their organisation and its program to look like, reflecting gender justice. They then take one or two flipcharts and draw a shared vision in the right upper corner. They can add key words to make it understandable for others. Next, they draw a road that brings travellers to the drawn vision.

The groups take a look at the flipcharts with the strengths and weaknesses related to the 12-Boxes Framework (from the previous assignment). They discuss which strengths they certainly like to build on to make the organisation and programs more gender-sensitive. They also discuss the weaknesses that they consider main stumbling blocks that need to be addressed in order to realise the vision. They write these strengths and weaknesses down on cards and paste them along the road.

Lastly, they focus on the context in which the organisation operates. They select a maximum of five contextual factors and/or actors that help or are likely to help in reaching the end station or vision of gender mainstreaming. They write them on cards, one card per factor and/or actor and paste them on the drawing. They follow the same procedure for contextual factors and/or actors that hinder or may hinder the process. When finished, they put the flipcharts with the drawing of the road and vision on the wall to share it with the other groups.

Note This assignment can be replaced by an exercise from the WEMAN manual: the Challenge Action Tree. This tree helps to sort out the range of possible responses and changes which can be made in the organisation/programs. It consists of 4 parts:

- a trunk representing an issue, challenge or institution
- roots and rootlets representing causes or inputs
- branches representing solutions or outputs
- fruits on the branches represent concrete action steps which can be tracked over time.

The Challenge Action Tree aims to help people to analyse the reasons for and interrelations between different dimensions of the challenges selected, emphasise the need to address practical issues in strategic ways, share and exchange ideas for solutions to different dimensions of the challenges and generate at least 3 individual 'SMART action fruits' for each participant as their commitment to start the road to change. See www.wemanglobal.org

²⁴ See also the action plans and their follow-up of various organizations in the publication Politics of the Possible. Gender mainstreaming and organisational change. Experiences from the field (M. Mukhopadhyay, G. Steehouwer, F. Wong, 2006, KIT and Oxfam Novib).

Assignment 22. Priority setting and action planning

Objectives:	To define priorities for necessary and urgent actions to reach the vision of a gender mainstreamed organisation and programs. To develop a coherent action plan.
Expected results:	Priorities for action are set and a set of inter-related actions or a draft action plan are developed, also follow-up steps to be made. A working committee is installed in charge of the follow-up steps. Staff's commitment is expressed to take further steps in gender mainstreaming. Agreements on how to monitor the steps of the process.
Estimated duration:	2 to 3 hours
Method:	Priority ranking.
Materials required:	Cards of different colours, markers, flipcharts, pens, notebooks

Steps for the facilitator

Ideally, all the staff members who have participated in the different assignments come together for the formulation and drafting of the action plan. You can invite all staff or you work with representatives of the three staff categories. For process management reasons it is advised not to exceed 40 participants. The organisation has to see to it that those who do not attend are well-informed about the outputs. If it is preferred to have a break after the whole assessment process, you can do the formulation and drafting of the action plan at a later date. Evidently, in this final workshop the participants can only suggest a framework of a draft action plan, which should be further developed in line with the existing decision-making procedures.

Exercise: How to do the priority setting – step 1:

Ask the participants to go over the strengths, opportunities, weaknesses and constraints identified in Assignment 21. Form groups of four and ask them to propose two actions which they feel are important, urgent and feasible to undertake in the next three months, while considering the opportunities and constraints. Each group writes the two actions on two cards in short sentences using specific and simple language. After that they put the cards on the floor or on the wall at a certain distance of each other. Then ask the participants to choose the card that is first priority to take action on, to move and stand near. Count and write down how many participants have chosen each priority. Repeat the procedure for the priority that is second in importance. Stop the priority setting when a maximum of six priority actions have been selected.

How to explain strategy development and action planning – step 2a:

Use the 12-Boxes Framework to show what issues need to be considered to address priorities and how a strategy can be developed to come up with a coherent action plan. It is important to include various elements belonging to different boxes. Especially the boxes 3, 5, 6, 11 and 12 are crucial to consider, because they refer to the hidden, deep layers of culture: values, norms and customs which (often unconsciously) reproduce and maintain discriminatory behaviour and practices towards women, older people, ethnic minorities or people with differing sexual identities. An imaginary example on how to explain strategy development is given in the box below.²⁴

An example on developing a set of interrelated actions

Let us assume that the participating staff members wish to give priority to increasing knowledge and skills of program staff on how to promote women's leadership at the community level. Going through the elements of the 12-Boxes Framework they should consider a few conditions to ensure that such capacity building is feasible and attainable, such as:

- Is building women's leadership grounded in the organisation's policies or is it a stand-alone action? – What do Box 1 on Policies and Actions and Box 3 on the Organisation's Culture tell us?
- Is building leadership an integral part of the program design? Is it clear how to address the issue? – What can we learn from Boxes 9 and 11 on Program design?
- Is building women's leadership supported by the different actors influencing program design and implementation? – What does Box 10 on Various Influences on Program Design and Management say about motivation or resistance?
- Is staff motivated to address the issue? – What do Boxes 10 and 12 Program Staff's Capacity and Attitudes tell us?
- Has staff the space in terms of time, resources and support to act on it? – What does Box 11 Room for Manoeuvring tell us.
- Have clear decisions been taken on capacity building of staff and on allocation of resources? – What does Box 5 on Decision-making reflect?

The answers to these questions help in identifying the issues that need to be addressed and their order, before knowledge and skill building of staff can take place. Perhaps a first step is to revisit the program policy to ensure that women's leadership is a central part of the program strategy. Or, one of the steps could be to discuss women's leadership with resisting community leaders. Or, action may be needed to provide evidence to all program staff that female leaders make a difference. Or, resources need to be sought for training. And so on.

It may be good to stress that there is no single model to follow in order to mainstream gender in any organisation or program. Organisations have different resources and options, different starting points, varied missions and they work in different, continually changing contexts. The journey of gender mainstreaming is unique to each organisation.

How to do develop a set of actions or a draft action plan – step 2b:

You now form groups around each priority. The groups come up with a set of interrelated actions and the key actors involved, per priority. They can add a time schedule (what, who, when), objectives and indicators to measure progress. The draft action plan is written down on a flipchart to be shared with and commented on by other groups. Lastly, you can ask the participants to write down, in one of the most favoured drawings of the vision journey, the planned actions the group has agreed on. Additionally, the participants can indicate 'rest houses' in the drawing to show when they are going to monitor progress against certain indicators (see for examples annex 2). Such a drawing can be put on the wall at a prominent place in the office, as a working document.

How to ensure follow-up – step 3

First, assist the participants in electing a working group of staff (can be different categories) who will ensure that the draft action plan is on the organisation's decision-making agenda. Second, one or two staff members are assigned, who will combine the output of the full self-assessment exercise, as presented on flipcharts and cards, into a report for dissemination among all staff of the organisation. You could also discuss this issue with the organisation prior to the workshop to ensure that staff members are assigned to the task.

With this proof of commitment the self-assessment exercise has come to an end. Hopefully this is the start of a successful gender mainstreaming journey.

Note For examples of Action Plans of ON counterparts, see www.oxfamkic.org Community "Gender Mainstreaming and Leadership Trajectory".





Notes

A large area of horizontal dotted lines for taking notes.



Annex 1

Gender-related concepts used in the manual

Annex 1 Gender-related concepts used in the manual

In this section we present some definitions of gender related concepts that are used in this manual. We present the definitions Oxfam Novib usually applies. However, it is important to stress that the facilitators of the workshops should not use these definitions as a blueprint. The facilitators should use a vocabulary that is commonly used or understood by the NGO. He or she chooses what concepts to discuss and explains the issues in understandable words, fitting the context and audience.

Empowerment “is the process of enhancing the capacity of individuals or groups to make choices and to transform those choices into desired actions and outcomes. Empowered people have freedom of choice and action. This in turn enables them to influence better the course of their lives and the decisions that affect them.”²⁵ An important element of women’s empowerment is women’s self-reliance, which relates to “the individual woman’s ability to gain access to resources and to take decisions affecting her own personal life”.²⁶

Gender competence refers to the capacity of an organisation to address gender justice issues both in the organisation itself and its programs. Capacity refers to the financial, technical, material and human resources that affect whether an organisation and its staff members can implement activities and achieve their objectives.

Gender equality is about opportunity. It means that women should have equal rights and entitlements to human, social, economic and cultural development and an equal voice in civic and political life.²⁷

Gender equity is about outcomes. It means that the exercise of the rights and entitlements to human, social, economic and cultural development leads to outcomes that are fair and just. The term gender equity refers to equivalent outcomes in the lives of men and women, recognising their different needs and interests. Consequently, it indicates that a redistribution of power and resources is required. In that sense, gender equity moves beyond equality of opportunity, because it requires transformative change. That is why gender equity goals are often seen as being more political than gender equality goals.²⁸

Gender mainstreaming is the process of assessing the implications for women and men of any planned action, including legislation, policies or programs, in all areas and at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of all policies and programs in all political, economic and societal spheres. It will lead to a situation in which women and men benefit equally and inequality is not perpetuated. It is not an end in itself. The ultimate goal is to achieve gender equality and gender justice.²⁹

25 Oxfam Novib (2007) Gender Justice: Empowerment and Inclusion. Aim 5 The Right to an Identity: Gender and Diversity. Jeanette Kloosterman.

26 Sara Longwe and Roy Clarke, Towards Improved Leadership for Women’s Empowerment in Africa: Measuring Progress and Improving Strategy, African Leadership Forum, 1999.

27 Derbyshire, Helen 2002 Gender Manual: a practical guide for development policy makers and practitioners. Department for International Development (DFID): Social Development Division.

28 Idem.

29 Agreed Conclusions on Gender Mainstreaming. Geneva: United Nations Economic and Social Council, 1997. <http://www.un.org/documents/ecosoc/docs/1997>

Gender Justice can be defined as the ending of, and the provision of redress for inequalities between women and men that had resulted in women's subordination to men. It helps to see gender justice as an outcome and as a process, differentiating between what is to be achieved and how it is to be achieved. For ON Gender justice as an outcome, implies:

- Equal economic conditions for men and women (taking into account formal and informal working hours, equal pay, labour conditions, control of and access to assets, food security, etc.)
- Equal access to education, health services, water and sanitation and institutional decision-making power with respect to those services.
- Equality in assistance and protection in humanitarian crises, with women's participation and leadership in planning and implementing.
- Equality in civil and political participation, with the goal to achieve transformative leadership at different levels of society, by and for women and men.
- Self-determination of women in their sexuality, reproduction and lives or lifestyles.³⁰

These outcomes have to be combined with agency (the ability to make choices).

Gender justice as a process brings in an additional essential element: accountability, which implies the responsibility and answerability of precisely those social institutions set up to dispense justice: the family, the community, the market, the state, and even the institutions of establishment religion. In one way or another, these institutions are supposed to settle disputes, establish and enforce legal rules, and prevent the abuse of power. Understanding the ideological and cultural justifications for women's subordination in each arena can help identify how to challenge patterns of inequality.³¹

Transformative Leadership has been defined by Oxfam Novib as "leadership aimed at reform, in which social problems are approached in a holistic, coherent way in a long-term perspective, and in which citizens are challenged to change and to take their own and collective responsibility."³² And Oxfam Great-Britain states: "transformative leadership explicitly seeks to challenge [gender] inequalities".³³ In OI the following draft definition (May 2010) of TWL is presented:

"Women's transformative leadership is used as a strategy for achieving GJ and social change objectives. TWL fosters enabling environments for facilitating the actualisation of WL potential and the empowerment of others, supports the articulation of a political voice to assert women's rights, needs, and interests, aims to transform power relations to establish inclusive and democratic forms of leadership and participation within organisations and social relations, and facilitates the collective capacity for change across

30 Oxfam Novib (2007) Gender Justice: Empowerment and Inclusion. Aim 5 The Right to an Identity: Gender and Diversity. Jeanette Kloosterman.

31 From: Goetz, Anne Marie. Gender Justice, Citizenship and Entitlements: Core Concepts, Central Debates and New Directions for Research. In 'Gender Justice, Citizenship and Development', Edited by Maitrayee Mukhopadhyay and Navsharan Singh, New Delhi: Zubaan, an imprint of Kali for Women, 2007:15-58.

32 Oxfam Novib Business Plan 2007-2010.

33 Oxfam GB, Women's Leadership and Participation: Overview, Women's Leadership and Participation: Programme Insights, 2008.

34 In Making Women's Leadership Explicit: An Oxfam International Learning Review. Alexandra Pittman, Oxfam International 2010.

35 Gender Mainstreaming and Transformative Female Leadership Development: Voices from Ethiopia. By Olubunmi Dipo-Salami, Emrakeb Assefa, 2007. Oxfam Novib.



different communities, including gender, racial, ethnic, religious, sexual orientation, etc, as well as networks, movements, and state-civil society.³⁴

Transformative leadership is a veritable tool for furthering the aim of gender mainstreaming. The process of mainstreaming, when adopted with the goal of ensuring an equitable world, will ultimately facilitate the development of leaders, women and men, who will bring an end to poverty in the world and transform societies.³⁵





Annex 2

List of tentative indicators to be used to measure progress or results of the GMLT

Annex 2 List of tentative indicators to be used to measure progress or results of the GMLT

During the ToT 2 workshop in The Hague 2009, the participants did an exercise with a list of indicators ON had prepared. The results of this exercise are presented here.³⁶

Number in list	Indicator	Number of stickers
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Output Indicators at the counterpart level

4	Number of GMLT action plans developed, including process, output and outcome indicators study. ³⁷	7
7	Number of trainings on gender awareness, gender analysis and gender planning given to decision-makers, management, other staff and at community level	3
1	Number of workshops (specify start-up workshops, annual workshops, etc.)	1
6	Number of learning and exchange events due to the GMLT that have taken place in countries and regions.	1

Outcome Indicators at the counterpart level

10	Number of women in leadership roles/decision making positions both in the organisation and at the community level. Feel a need to define leadership then, because it is not the same as decision making!	11
13	Organisation uses sex-disaggregated data in progress reports/evaluations for reflections on aspired outreach to men-women-vulnerable groups per project. ³⁸	7
17	Staff applies gender sensitive methodologies at community level and is capable of applying gender justice elements in their work. ³⁹	7
16	Organisations have a GJ policy related both to program and workplace policies. ⁴⁰	6
11	Number of participatory gender analysis undertaken about the programs executed, involving both women and men at community level.	4
12	Organisation 's programmes reflect GJ objectives.	2

³⁶ For the complete list you can have a look at www.oxfamkic.org, Community "Gender Mainstreaming and Leadership Trajectory", file documents, ToT2 report (2009).

³⁷ Action plans can include, amongst others, studies, baseline surveys, self-evaluations about programs. This is an important point and should be explained better, in main text! As it is now it can be confusing.

³⁸ In relation to the 70% target of ON & to reflect on roles of men-women in development/change strategies.

³⁹ Including monitoring and evaluation activities (gender indicators!), with the participation of men and women from the communities.

⁴⁰ For example on affirmative action and procedures for sexual harassment, equal pay, etc.

Number in list	Indicator	Number of stickers
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Output Indicators at ON level

20	Number of action plans being implemented in the organisation.	
23	Number of trainings/workshops connected to the GMLT.	2
New	Programs propose activities that reflect the strategic (and practical) interests of women and men.	3

Outcome Indicators at ON level

34	The budget of ON's Business plan 2011-2014 reflects gender budgeting.	4
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