Incorporating Gender into your NGO

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1 INTRODUCTION

Nowadays the word gender is in common use. However many people do not know the meaning behind the word and what gender could mean for an organization and for development in general. Often an NGO or CBO has a problem knowing how to put gender into all aspects of the organization and thus reach gender mainstreaming, balance and equality within the organization and in its activities.

This manual tries to help in this process, starting with an explanation of basic concepts and definitions on gender, followed by '*what to do and how to do it',* both within and outside your organization, in order to scan all aspects with a gender sensitive eye. In the process it explains the need for change and the constraints; it offers an awareness of wrong concepts and influencing factors.

Several steps are needed in the process of 'engendering' your organization and these steps are described one by one, from analysis of your organization, development of an action plan, implementation and then monitoring and evaluation.

Finally, related resources and websites are given; links to tools, like gender checklists for the project cycle, are provided.

2 GENDER, WHAT DOES IT MEAN?

When asking people what the word gender means, often the first reaction is: 'gender is women'. This probably stems from the fight of the first feminists to draw attention to women's issues and rights. However, gender is not only about women.

The following poem could be helpful in understanding the concept of gender.

For Every Woman

By Nancy R. Smith

For every woman who is tired of acting weak
when she knows she is strong,
There is a man who is tired of appearing strong
when he feels vulnerable.

For every woman who is tired of acting dumb,
There is a man who is burdened with the constant
expectation of "knowing everything."

For every woman who is tired of being called
"an emotional female"
There is a man who is denied the right to weep and be gentle.

For every woman who feels "tied down" by her children,
There is a man who is denied the full pleasure of parenthood.

For every woman who is denied meaningful employment
and equal pay,
There is a man who must bear full financial responsibility for
another human being.

For every woman who was not taught the intricacies
of an automobile,
There is a man who was not taught the satisfaction of cooking.

For every woman who takes a step toward her own liberation,
There is a man who finds that the way to freedom
has been made a little easier.

— courtesy of DAWN

3 GENDER: KEY CONCEPTS AND DEFINITIONS

Sex and Gender

Sex and gender: what is the difference between these ideas?

Sex is the biological difference between men and women. Sex differences are about the fact that men produce sperm, women bear and breastfeed children; men and women have different bodies, hormones and chromosomes.

Sexual differences are the same across the world. But being a man or a woman is very different in various cultures. To distinguish these differences from the biological ones, the word **gender** is used. Sex is a fact of human biology: gender is not.

The position of men and women in society is the result of differences that are socially determined. The word gender refers to those socially defined differences. People themselves define certain behaviours and qualities as being masculine or feminine and identify certain activities as being appropriate for men or women in a specific society. What is women's work in one country or community might be men's in another.

> *In Ethiopia, highlanders consider building a house as a job for men, but among most nomadic people it is a women's job. In Bangladesh, weavers are mainly men, but in Central America women are the weavers. In most parts of Sudan, water is collected by women, but in the Red Sea area in the north-east, men collect the water as women are not supposed to show themselves in public places.*

Specific gender behaviour is based on and influenced by the cultural, legal, social, economic and political environment in which people are living. And in family relationships gender behaviour is also deeply rooted and defined. As a result of gender differences, women and men have different experiences in life and their knowledge, perspective and priorities are not the same.

Gender roles

Gender roles are the roles men and women are expected to 'play' in society. Society has allocated different roles, responsibilities and activities to women and men according to what is considered 'appropriate'. Often (but not always) men are supposed to earn the income for the family, while women take care of the household and children.

Gender division of labour

Both men and women work to maintain households and communities but their work tends to be different in nature and in the value put upon it. These differences are based on gender relations and can be a source of conflicts.

Women take care of the social and emotional wellbeing of their families and thus contribute to development. However, their work is usually less valued than men's. Often, women's work is not considered important, is often paid less or not at all; it is not mentioned in official reports, documents or national statistics. Often it is completely neglected when projects are planned in an area or community. If no proper study on the roles, tasks and responsibilities of men and women has been conducted, the work and contributions of women remain invisible.

When planning an agricultural program in the northern part of the Cameroons, discussions took place at various levels, with government institutions, village committees and villagers. However, due to cultural restrictions and the fact that all project staff were men, discussions only took place with men. And no one thought that women could contribute anything useful. The project was developed and reached the implementation phase.

Families were supposed to stay for one year at an agricultural centre, where they would learn new agricultural techniques and how to work with oxen. The project staff had developed a nice housing structure, with one house (hut) for each family. Each family got a piece of land, on which both men and women were supposed to work all day. They brought some staple foods, from their own last harvest, with them.

Soon difficulties arose. First of all, living in just one house created problems, as this was socially not accepted. In the villages, men and women had had their own huts, in which they would conduct their own activities and have their own social life.

Secondly, men started to complain about the daily food. In the villages, each woman would have their own piece of land, on which they cultivated vegetables, spices and herbs. Usually they also had some chickens and goats. At the agricultural centre, these products were lacking and thus the diet of the family deteriorated seriously. No one had looked at the work and role of the women in these communities.

In the project identification phase, what is needed is a participatory study and analysis of the different tasks, labour, responsibilities and needs of all involved stakeholders, both men and women. This ensures that the project is designed in a way that responds to the needs of all stakeholders and that both men and women will benefit. In some situations, the different work done by girls and boys, female and male elders might also be examined.

A huge rural development program was developed in South Ethiopia. Discussions took place with men; women were barely involved, though the project got a specific unit for women and the government Office of Women's Affairs was involved. Specific programs for women were supposed to be developed separately and be mainly for income generating.

Lots of data on issues like agriculture, water, transport, health, marketing etc were collected. From men only. Programs to improve agriculture and cattle raising were developed for the men. Tools to facilitate agricultural production were distributed to the men. All sorts of training were given. To men.

Only after the first stage of the project, was a gender specialist attached to the project to 'develop the women's part'. A gender study, collecting data that was "gender disaggregated" (separated out) quickly revealed the fact that women in that area contributed enormously in the economic field, having huge responsibilities in agriculture, the care of animals, production of items to be sold and marketing. The problem was that no one had ever investigated their roles, their work was not acknowledged and they themselves did not have the education, power or access to the right resources to make this evident.

As all these tasks contributed to the family income and family food security, they also were quite interested in agricultural training and access to resources like agricultural and veterinary services, loans etc.
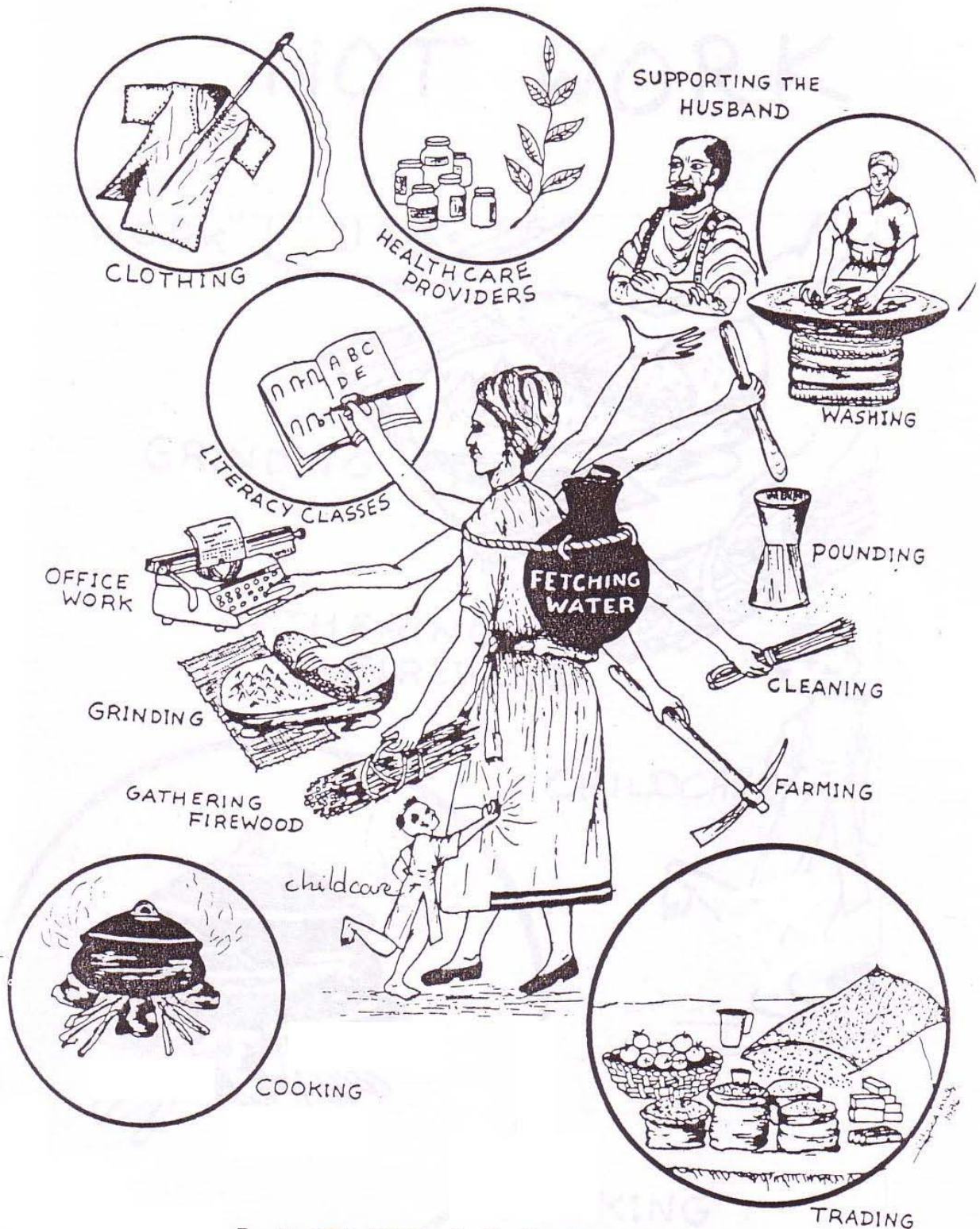
Division of work

Work can be divided into three main categories:

- *Productive work* involves the production of goods and services for consumption and trade. When asked what they do, people often mention productive work, especially work which is paid or generates income.

- *Reproductive work* involves the care and maintenance of the household and its members, like bearing and caring for children, food preparation, water and fuel collection, shopping, housekeeping and family health care. Reproductive work is essential to human survival, but is seldom considered 'real work'. ('She is just a housewife….') Often it is time consuming, labour intensive and almost always the responsibility of women and girls.

- *Community work* involves the collective organization of social events and services: ceremonies and celebrations, community improvement activities, participation in groups and organizations, local political activities, and so on. Both men and women engage in community activities, although a gender division of labour exists here as well. (For example the political and decision making parts are often men's, community support like preparing food for festivals is often women's).

  It's extremely important to analyze the work of men and women in all areas. Changes or interventions in one area will affect the other areas. Participation in meetings for example, will reduce the time available for other tasks.

MY WIFE DOES

CLOTHING

HEALTH CARE PROVIDERS

SUPPORTING THE HUSBAND

WASHING

LITERACY CLASSES

OFFICE WORK

POUNDING

FETCHING WATER

CLEANING

GRINDING

FARMING

GATHERING FIREWOOD

childcare

COOKING

TRADING

NOT WORK

Gender needs

As men and women have different tasks, they also have different needs. Child bearing requires natal care and access to specific health services. Being the head of the household requires the skills and means to provide sufficient income.

Needs could be divided into practical and strategic ones.

Practical gender needs

Practical gender needs could be water provision, health care, provision of agricultural tools or income earning for household purposes. These needs are mostly connected to the reproductive and productive work and to the specific tasks of women and men. Responding to these needs will solve practical problems but mostly will not change anything in power relations, control over resources or decision-making power.

For example: providing health care facilities does not necessarily mean that a woman can make her own decision to go there and spend money for her own care. Providing ways of improving agricultural production will not change a dependency on influential middle men, who buy the harvest at a low price and will sell it for much more.

Strategic gender needs

Responding to strategic gender needs addresses power relations, access to and control over resources, and decision-making rights. For example strategic gender needs could be - access to credit and other resources; measures against violence; freedom of decision-making; and the rights to own land or property.

Responding to strategic gender needs will influence and hopefully change real issues about power, decision-making and access to and control over resources.

For example a change in the law so that women can own property will change the control over resources. Access of women to agricultural extension and support will address blocked access to resources. Organization of men in a cooperative might empower them to obtain better prices for their products.

Gender mainstreaming

The goal of gender mainstreaming is to ensure that the concerns and priorities of men and women in policies and programs are given adequate consideration; that men and women have equal opportunities to setting goals and priorities, to participate and benefit.

At the basis of mainstreaming is the knowledge that gender issues have relevance for all areas of development and that gender must be included in all areas of analysis, policy development and planning.

Gender mainstreaming should contribute to **gender equality**, where men and women have equal opportunities and rights and can benefit equally from programs and development. Gender should not be added to programs or projects but should be incorporated, as an essential ingredient, like yeast in bread. This should be done from the very beginning and in all aspects of the organization, its programs and projects. Only then will the gender approach work and be effective.

Gender analysis

Gender analysis is a key instrument for gender mainstreaming. The question then is: what needs to be analyzed?

Usually the following:
- The roles of men and women;
- The responsibilities of women and men;
- Access to and control over resources for men and women;
- Decision-making and power of women and men;
- The needs and potentials of both men and women;
- The relationship between women and men;
- And the impact on the situation and position of men and women.

Gender analysis should be used at all levels and in all areas of society - at household level, community level, government level, but also at institutional level. Gender analysis within an institution or organization will provide a clear picture of the gender situation and will indicate what the next steps on the road to equality could be. If an organization is gender sensitive and gender equal, this will have its effects on its operations and will thus contribute to gender equality in the society in which it works.

"Gender disaggregated" data (separated out data)

Your NGO needs to know what the tasks, roles, responsibilities and needs of men and women are; it needs to get information about the power relations, access and control over resources and decision-making processes. So it needs to separate out the data collected from the stakeholders, to separate data collected from men and from women. The result is called gender-disaggregated data.

Sometimes data also needs to be separated out for boys and girls, for elderly men and women and other age groups, even sometimes with different ethnic groups in one community. In agricultural programs, for example, you need to know which tasks are performed by the men, which by the women; how much time the man spends on his various activities, how much time the woman spends on hers.

Gender-disaggregated data from health centres in Bangladesh showed that more boys than girls were brought to the health centres. The reason was that people would not willingly spend money on a girl. Her 'value' was zero; indeed she would in the end cost money when the father paid her bride price, after which she would live with her in-laws. Boys, on the other hand would stay with and take care of the parents.

4 WHAT TO DO AND HOW TO DO IT

So now you understand the basic concepts of gender, the important questions are:
- How do you bring about changes?
- How do you ensure gender equality within the organization?
- Where do you start?
- What do you look at?
- How do you get prepared?

Preparatory stage: Requirements for change

In order to incorporate gender into an organization, first of all the organization has to be willing to change and, even more important, to see the need for this change.

Change is never welcomed: at this moment you know what you have – but in the future you do not know what you will get. And if you are happy with the present situation, why should you change? Change is something to fear. You might lose control or power. It might affect your status. You might make mistakes. To motivate people to change requires that they see the need for change as well as the self-interest – the benefit for them personally as well as for the organization and its target groups.

An important point is that members of an organization need to share the definition of a problem and must 'own' the goals of change. So they must identify the need for change themselves. Carrying out a SWOT analysis, as described on page 13, and involving all members, might be the first step on this road to change.

Getting the heads in the same direction

Source: IFRC
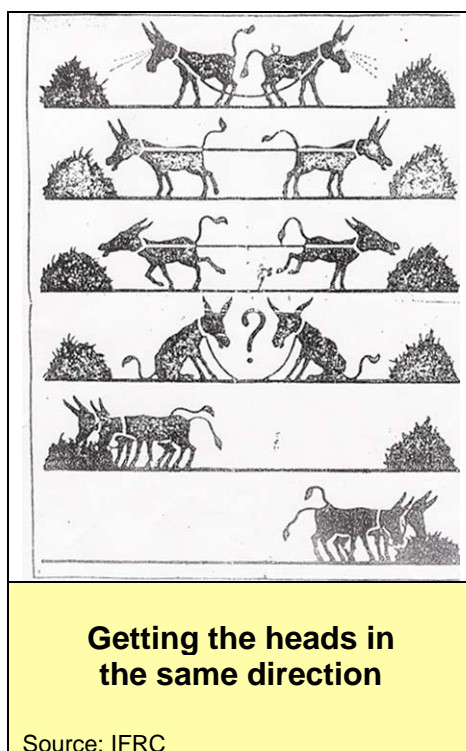
What should you be aware of at this stage?

- Fears need to be identified and discussed openly so these can be dealt with.

- Resistance often comes from not having sufficient information or knowledge. Gender may be associated with particular personalities or programs and is often not a natural part of the organization as such. Gender is 'women'. Gender meets resistance. Gender is not recognized as important for the development of men and women and thus for the society as a whole. Some rusty and old-fashioned ideas about gender might prevail. So a sound understanding of gender concepts, of the role and importance of gender in development are essential. In other words, members need to become gender-aware and acquire sufficient gender knowledge.

- Change needs to happen in the culture, structure, procedures etc of the organization, but also at the personal level. Learning, willingness to change and adjust is a necessity. In other words, there must be commitment to gender equality.

- There is no common recipe for change. Each organization requires a tailor made approach, in line with the specific situation and needs of that organization, the people involved and the environment in which the organization is functioning.

- Each change process has to start with the analysis of the present situation in order to decide what needs to be changed. The problems and needs, the present situation with regard to gender and all its aspects, have to be identified, before action for change can be taken.

- During the process of change, constraints and opposition will be met with. The constraints could be around time, people, financing and at the level where decision-making power lies. To deal with opposition, you have to find out why certain people are opposed to change. What is in their particular interest? Understanding why people think in a certain way can help in finding solutions or getting agreements.

- Change has to be seen as a process, in which, step by step, you move forward. Sometimes you have to go back, to 'revisit' places in order to get issues clear or make people understand.

- People often are more willing to cooperate if they see the benefit of the change. This requires good explanations, having your arguments ready and be able to discuss with them what the benefits could be.

> *In the Cameroons it was the tradition to focus health education only on women. However, in general and certainly to 'the outside', men are the main decision-makers.*
>
> *In an agricultural centre, where women attended health information sessions, some of the men happened to be around when an explanation was given about vaccinations. They became very attentive and started asking questions.*
>
> *They fully understood (as the women did) the benefit of the vaccinations. Kids would have a greater chance to stay alive and also would run less risk of falling ill, which would save money spent on health centre visits.*
>
> *After that, health information sessions were open to men as well. As the men acquired a better understanding of health issues, they could support their wives for example in overcoming resistance from grandmothers, elders etc.*

- If people get involved and have a say in discussions and solutions, they feel they have a grip on things, that their ideas and suggestions are valued and recognized, that they matter, and they will be more willing to support the process and contribute to change.

- A strong commitment from the 'top' management will facilitate change.

- If you identify the strong sides of your organization, and work from there – known as strengthening your strengths – you will make better progress than by focusing on the negative points and condemning.

> *In the northern part of the Sudan, a small CBO wanted to improve the food security in a village. Discussions took place with men and with women. The aim was to start a grain bank, in order to save seeds, to always have a sufficient supply when needed and to raise money from selling or 'borrowing' seeds.*
>
> *First the men wanted to have all the responsibility for the bank, to be on the executive committee and to be the decision-makers. The women pointed out that the men were often away, working elsewhere, that this was not a practical solution. The men proclaimed that women were not able to run such a bank.*
>
> *After long discussions, exchanges of arguments from both sides and negotiation, the solution was found. The women would run the grain bank on a daily basis, while two of the older men who would be staying in the village would function as advisors. The women and advisors would receive some specific training and assistance from the CBO in order to get started and run the bank.*
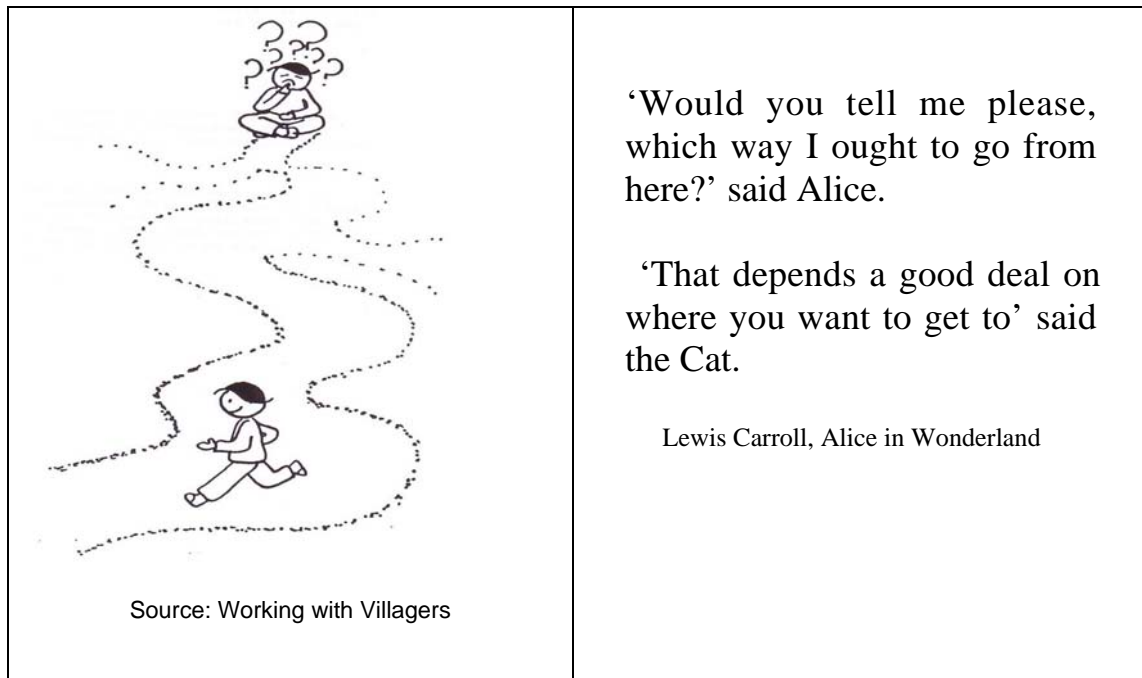>
> *Benefits would be used for improvement of the whole village - to increase the food security, but any extra could be used for example to buy new blackboards for the school or to repair the water pump.*
>
> *The project became a success. Men got quite supportive when around and the whole village benefited.*

The next steps

The preparatory work is done. The need for change has been identified. Ideally, everyone is ready to start working on gender mainstreaming. What next? You'll have to start at the beginning: 'Where are we?' and 'Where do we want to go?'

'Would you tell me please, which way I ought to go from here?' said Alice.

'That depends a good deal on where you want to get to' said the Cat.

Lewis Carroll, Alice in Wonderland

Source: Working with Villagers

After the preparatory phase, the following steps need to be taken:

- Step 1: **analyze the organization**

- Step 2: **identify the changes needed**

- Step 3: **develop strategies and an action plan**

- Step 4: **implement the action plan**

- Step 5: **monitor and evaluate**

At this point it might be useful to look at the project cycle information in the manual *'How to Build a Good Small NGO'* (section A or Chapters 3-6) – free to download from the www.networklearning.org website.

Step 1. Gender analysis of the organization

How gender-sensitive or -aware is the organization? How willing and knowledgeable is all staff to contribute to gender mainstreaming? Do they understand the need for, the importance and benefits of gender mainstreaming?

First of all you need to make a gender analysis of your organization. In order to do so, you need to look at the organization's profile. There are different ways to do this, but a rather simple profile that shows all aspects of an organization is the following:

Organizational profile	
Mission statement	The reason for being of the organization
Goals and objectives	The purpose of the program/ project/ organization
Strategies	Approach and ways to achieve goals
Activities	Sets of tasks undertaken to implement strategies and reach goals
Structure	Organizational chart, positions in the organization, the division of tasks, responsibility and authority
Systems	Procedures and tools for analysis, planning, monitoring and evaluation
Resources	Personnel, finances and infrastructure
Culture	Attitudes, behaviour, norms and values of the organization's staff/ members
External relationships	Co-operation with other organizations, networking

SWOT analysis

A handy tool to use is the SWOT analysis.

SWOT stands for:
- **S**trengths
- **W**eaknesses
- **O**pportunities
- **T**hreats

A SWOT analysis reveals the strong and weak points of an organization and the opportunities and threats outside the organization.

A specific gender analysis aims to measure the capacity of an organization to deal with gender issues.

Practical points

The analysis is based on discussions with relevant informants selected from the organization. You could do this in several ways - semi-structured interviews with groups or individuals; questionnaires to be filled out by informants; group discussion with selected informants or discussions in a workshop where representatives from all departments and related groups are present.

It is often best to run a workshop, since gender deals with the organization as a whole. It is important that staffs from various levels within the organization are present - that the management and decision-making level and the executing agents like field personnel are represented. In a small organization, all staff could be present.

The workshop model has the following advantages:
- A fixed time is set and all participants have to ensure their presence and attention;
- By organizing a workshop, the organization makes it clear that they consider gender a serious issue;
- During the workshop, representatives from the different sections and fields can express their opinions, explain and exchange views and feelings;
- Misconceptions about gender can be dealt with;
- A workshop creates the opportunity for discussion and co-operation;
- In order to mainstream gender into an organization you need input, willingness and cooperation from all sides, sections and fields, and a workshop allows for this.

In order to make things run smoothly and well, you need a good facilitator, preferable with sufficient gender knowledge. This could be someone from within the organization (to keep costs down and use expertise from within), but also could be a neutral, specially hired facilitator, providing that he or she understands the culture of the organization and is familiar with its environment.

A workshop is time consuming. There are several options, from a few days in one block to several days divided over a limited period of time. Each has advantages and disadvantages. *Still, what you will be able to do will depend on the actual situation – what is possible, what is feasible, what you want. Can you challenge the whole process in one go – or should you go step by step?*

The **SWOT analysis** could be organized in several parts:
- For each component of the organization, strengths and weaknesses with regard to gender issues are listed and discussed. It's important also to look at and discuss the causes of the strengths and weaknesses. The outcomes are written in the matrix (see below) not as long sentences, just key words or phrases.
  Be aware that only the existing situation needs to be discussed, not the desired one.
- Then you hold a discussion on external opportunities and threats including the national policy regarding gender and emancipation of women; the attitude of the government towards NGOs and CBOs; the roles and attitudes of other organizations and donors related to gender; etc. The results are also noted on the matrix.
- This is followed by a brainstorming session, using the information on the matrix, on the question of how well the organization can cope with gender related objectives, activities and mainstreaming in the implementation of their program.
- Identification of the changes needed and prioritizing them is the next discussion. These will be noted on a separate paper.
- Finally (step 2) strategies and an action plan need to be developed, focusing on reinforcing the strong points and opportunities; then the group addresses the weak points and threats that might undermine gender capability by finding strategies to reduce or overcome them.

Overview of general organizational analysis
- Make an analysis of your organization based on the key elements of the organization. To focus on gender, use the gender related questions below.   - Ask the following questions (all in relation to gender):   - What are the strengths and weaknesses of my organization?   - What are the opportunities and threats facing my organization?   - Note the answers on a flipchart. Use key words, describing the present situation (not the desired one).   - Support each other, by asking, guiding, discussion

Example chart for a SWOT analysis			
Internal		**External**	
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Motivated staff	Lack of gender knowledge	Gender trainer available from other organization	Negative attitude towards gender from donor

Tailor-made

As each organization is different, each process needs to be tailor-made. Below are examples of questions that could be asked. You have to determine the relevant questions and develop your own. You have to determine your approach and way of working, depending on the structure, culture and 'outfit' of your organization.

It might be useful to regularly ask 'why' a situation is as it is. That also will facilitate the planning process later on.

Gender and what to look at?
(You also can use the gender checklists mentioned in Annex 2)

Mission statement
Does the mission statement reflect gender equality? Is gender at all considered in the mission statement?

Goals and objectives
Do goals and objectives clearly reflect gender equality? Are they focused on men and women and addressing each group's special needs? If they do not, what is the reason?

Strategies
Is there a gender policy? When was it developed, who was involved in formation? Does the gender policy cover the organization as a whole or is it only being used for specific purposes? Is it used only as 'lip service' when needed? Is the policy based on specific gender analytical information and data?
Is the gender policy being implemented, monitored and evaluated?
Do strategies reflect gender equality? What strategy has been designed to achieve the participation of the stakeholders? Is this strategy appropriate? Has your NGO identified the constraints to the participation of women and men? Has it begun to ensure that these constraints will be overcome?

Activities
Is there a specific gender approach for the activities of your NGO? Are the gender specific needs of the stakeholders known? And are the project's objectives in line with these identified needs? Is there a possible conflict of interest between men and women? Are gender-disaggregated data available and have these been used for the whole project cycle? (See pages 7 and 8 for explanations)
Are men and women (if applicable) involved in project planning, implementation, monitoring and evaluation?
Is gender mainstreaming present in all activities and is the impact measured, evaluated?
Do the strategy and planning of activities take into account the gender (power) relations at the household, community and society levels?
Are the choices of technologies, time, locations, communication methods etc., suitable for women and men? Do men and women have the same access to resources?

Structure
How does the organizational chart look from a gender perspective? Are there an equal number of men and women in the higher positions? And in the lower positions? How is the gender balance with regard to division of tasks, responsibilities, authority and 'power'?

Systems
Is attention for gender issues, gender mainstreaming and gender equality included in routine systems and procedures (information systems; appraisal, planning, monitoring and evaluation?
If recommendations for changes with respect to gender have already previously been made, what happened? Were staff members issued with guidelines/ information/ tools on gender mainstreaming?

Resources
Human resources:
What is the attitude of senior management staff to gender issues? Who does management consult with (internally and externally) about gender issues?

Is there a designed unit/staff member for gender? Since when? What is their mandate, their structure, their resources? What do they do? Do they have specific gender education/ background?

How effective are they? Why? What do staff members think of the gender staff?

Do all the staff have a responsibility for gender equality issues? What gender training, knowledge, skills and attitudes do they have? Is sensitivity to gender issues included in job descriptions/requirements. Is it asked for at interviews and monitored at appraisals?

Financial resources:
Is there specific budgeting/funding for operationalization and implementation of the gender policy, gender mainstreaming and gender equality activities? What effect has this had? Are the resources adequate? Is there specific budgeting/funding for staff capacity building with regard to gender? What effect has this had?

Infrastructure/ Facilities:
Does the organization create a safe and practical environment for women and men? Think about the working space and facilities, safety, working hours, transport arrangements, toilets, childcare etc.

External relationships
Which external organizations and people have an influence on the organization? Do they take gender seriously?

What is the general atmosphere on gender in the environment of the organization – among the stakeholders, in the field, among the village committees, the local leaders, government? Are there differences of opinion between the donor, the government and the organization regarding the focus on gender equality?

What is needed in this stage?

- *Realistic thinking*
  Working with gender requires a realistic attitude and thinking, an open mind, good communication skills and creative solutions. The world cannot be changed in a day. Long existing policies, attitudes, norms, values and ideas are difficult to change. Gender awareness raising, motivation and time are needed.

During gender training in Southwest Ethiopia, which was attended by 43 men, the issue of violence against women was discussed, as being common prevalence in that area.

*The men were quite open about their practices, which were culturally accepted. They **had** to beat their women, as this was considered to be an expression of love! If they did not, the social environment would really wonder and doubt if they loved their wives.*

The women who suffered the beating and wanted to divorce had the sole possibility of going and talking to the committee of elders, which consisted (of course) of men only. Who explained that the beating belonged to cultural traditions and thus they should not complain. Change in attitude and thinking here took a long time and great effort.

- *Acknowledge practical reasons*
  Practical reasons can play an important role in hampering or overcoming gender inequality.

In government offices in a small town in Southwest Ethiopia the number of women in decision-making positions was nearly none. During a gender analysis and planning exercise, it became clear that changes were needed.

However, as willing as the policy makers were to appoint more women, no women with sufficient education and/ or background were available, as few women in that area in Ethiopia attended higher education.

Finally this resulted in a policy in which women were given priority for further training and education. Also a specific program to promote education for girls and prevent 'drop-outs' was developed.

Step 2. Identify the changes needed

During the analysis exercise, notes were made on the existing situation in the organization with regard to gender. The next step is to identify which changes are needed and where.

In a health centre in Benin the female staff taught the advantages of breastfeeding to the mothers. However, they themselves were prevented from doing so, due to restrictions in their work situation. A desired change would be to enable the female staff to breastfeed their own babies.

Identify the changes needed.

- *Go back to the notes made during the analysis process*
- *Brainstorm with the whole group on where changes are desired. Which changes?*
- *Do not go into too many details at this stage - just identify the changes desired and/or needed.*
- *Note these down and with the group discuss which changes would have priority and why.*
- *Develop a logical and feasible list of changes to be addressed. Which is the most pressing one, the most important? Which are less important?*

Prioritize the changes desired. Which to address first, next etc.

Step 3. Strategic gender planning and action plan

After the analysis you have decided what you want to change or what needs to be changed. You made your list of priorities.

But how are you going to bring about these changes? What is needed? Who will do what? When, where? The process of discussing all this is called **strategic planning.**

The use of strategic planning is to transform the desired changes identified in the SWOT analysis, into clear objectives. This needs to happen in all layers of the organization and in all sectors. People need to be able to relate the objectives to their own work responsibilities. It should not be 'their' problem, the responsibility of 'high up there' – but 'our' problem. The task and responsibility of each person should be made clear. And, first of all, the desired changes have to be translated to objectives.

Objectives
Objectives are specific, measurable results to be achieved by a specific point in time. What do we want to achieve? (For example: *from now on, for all new projects, we will collect gender-disaggregated data.)*

Objectives need to be realistic and feasible. Each will require resources, financial and human, and these must be available or possible to acquire.

Objectives can also be divided into long-term (*in 3 years time, gender mainstreaming will be completely incorporated in the organization and in all its activities*) and short-term (*next month a gender training for field staff will be organized*). In order to reach each objective, you have to define how you are going to do it – and that is called a strategy.

Strategy
Strategy is the way the organization will meet the needs of its members. How are you going to do it? Which road will you take?

Action plan
From the objectives and strategies the action plan can be shaped, materialized.

When the objectives have been clearly formulated, the next step is to operationalize them – turn the objectives into an action plan. An action plan consists of several elements:

Activities: Which activities need to be undertaken in order to reach the objectives? When, where, by whom?

Required input: What do we need? Human resources? Financial, physical, material resources? Time?

Expected output: What do we expect to achieve? What will be the result of the specific activities and inputs in the course of the project?

Effects: What effect will the action or activity have on the stakeholders?
(*For example: gender training will make staff gender aware which will contribute to gender-sensitive projects)*

Indicators: These are how we measure the achievements of the objectives.
(*For example: in 6 months time 50% of our staff will be trained in gender; for our next project, gender disaggregated data will be collected)*

Assumptions: These are factors that are important for the project, but which are outside its scope. Assumptions are the answer to the question: 'What external factors are not influenced by the project, but may affect its implementation and long-term sustainability?'

Time line: An action plan needs a time line. When will you conduct certain activities? When will you expect results? When will you measure the expected effects?

To conduct a strategic planning exercise that can result in an action plan, the following approach could be used:

Strategy development and action plan

After finalizing the analysis part, possible strategies are needed.

Using the list of desired changes which you decided on, you could divide the participants into small groups and provide each group with a 'desired change' to work on. Each group could then present their proposal in a general discussion later on.

- The general idea behind each plan is:
    - How can we strengthen our strengths?
    - How can we overcome our weaknesses?
    - How can we use the opportunities?
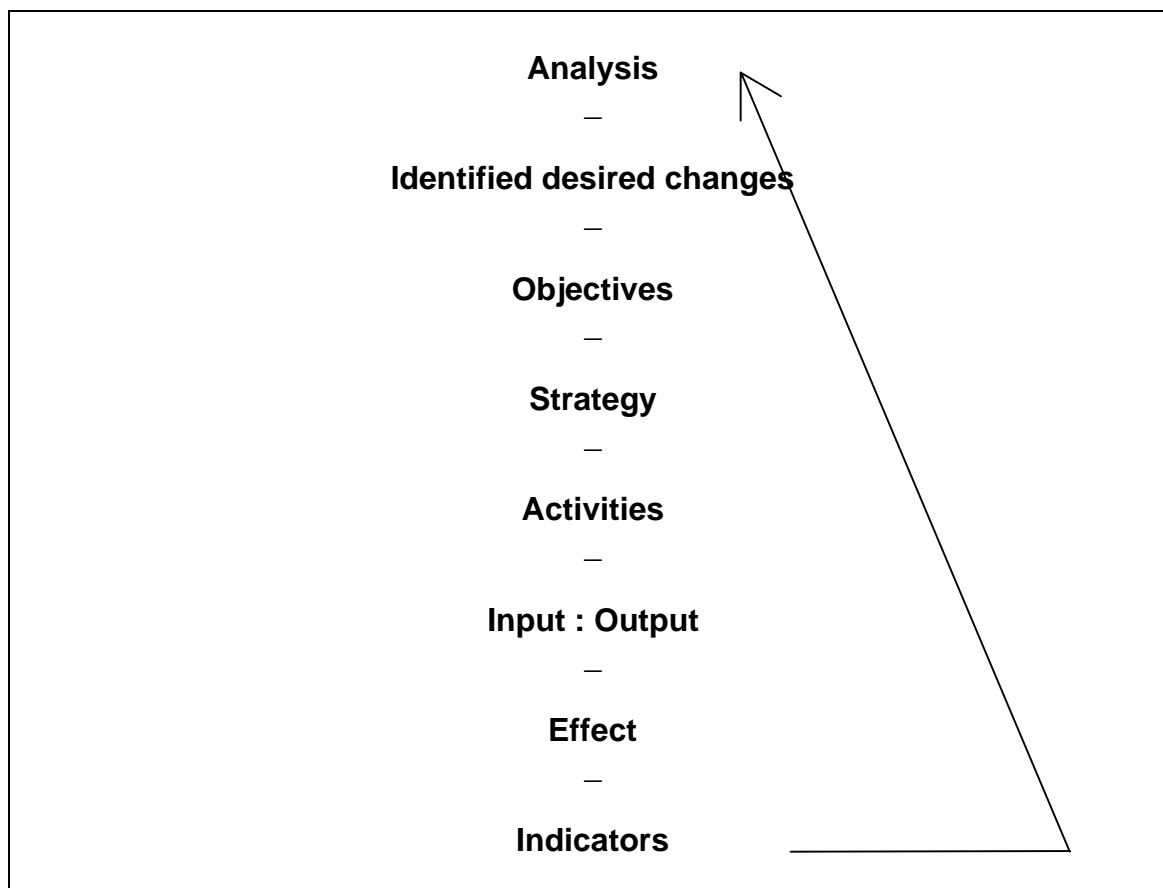   - How can we evade the threats?

Each group should work on the following:
- *Objectives:* Describe the change that is needed and define exactly what the objectives will be;
- *Strategies:* Think of applicable strategies. Write these down. Ask if these strategies can be used, how, when, where?
  Are there alternative methods that could be used? (See also notes below);
- *Activities:* Describe the activities to be done (Where, when, by whom);
- *Input:* List what resources (human, material, financial, time) are needed;
- *Output:* Describe what you expect to achieve. What will be the result of the specific activity and input?
- *Effect:* Define the possible outcomes, in terms of what each plan will contribute to gender relations, mainstreaming or gender equality;
- *Indicators*: Describe the indicators to be used for measuring the achievements, the desired changes;
- *Risk and assumptions*: Discuss possible obstacles that you might encounter and conditions that you need for this strategy to be implemented.

Examples of strategies that can be used to reach gender balance:

- Stakeholder analysis on the basis of gender-disaggregated data;
- Policy formulation on gender;
- Strategic gender planning;
- Gender training;
- Allocating budgets for the purpose of gender balance;
- Collecting gender disaggregated data;
- Setting targets for reaching gender balance in staffing at different levels;
- Altering recruitment criteria and procedures;

- Using a gender checklist for project approval;
- Restructuring departments to mainstream gender;
- Appointing one or more gender-responsible staff;
- Making the workplace and work style more women-friendly in various ways;
- Devising and implementing gender equality monitoring and evaluation mechanisms;
- Securing the commitment of top management to change towards greater gender equality.

Analysis

–

Identified desired changes

–

Objectives

–

Strategy

–

Activities

–

Input : Output

–

Effect

–

Indicators

Matrix for an action plan

For an action plan you can use the following matrix. Nowadays a log frame is often used for planning. Though the log frame is an effective and excellent tool, you'll need an expert with you to put it together in the right way. However, if you are familiar with the log frame, use that instead of this matrix.

Objective	Strategy	Activities	Required input	Expected output	Effect	Indicators	Assumptions

Step 4. Implementation

The next step is the implementation of the action plan. This a period in which people will learn by doing, by discovery, by being confronted with gender issues, their causes and effects. If things go well, if staff members are motivated and are involved in the decision making, they will start feeling responsible for what they are doing, which will create

'ownership'. The feeling of ownership is essential if staff members are to feel dedicated and believe in what they are doing.

Ideally, during the whole process you would have an experienced trainer or facilitator – someone with gender-sensitive attitudes and knowledge who can assist, advise, facilitate and guide the process. This person should be well accepted and respected within the organization, should know the local situation and be a good organizer. Another option might be to create a small committee with dedicated and well-respected staff members from various departments or sectors. A facilitator from outside is another possibility.

The whole process will involve learning by doing and making mistakes; so you have to analyze the causes of the mistakes and try to find solutions or strategies that work better. But do not forget to enjoy the positive outcomes and results. To bring about changes requires patience, courage, dedication and not giving up.

General remarks
- Though there are still many demands for projects to improve the situation of women, the situation of men is often a difficult one as well, with problems of human rights, poverty, hard work, lack of facilities and much more.

In Bangladesh, in the beginning of the nineties, HIV/AIDS had become a real problem. For a long time, awareness raising was directed at women and information sessions were held with women only. One of the organizations, realizing that information to women did not have a sufficient effect and finally decided to focus on men as well. So they started to provide education and information to groups of men like truck drivers, army and police personnel and thus succeeded in focusing on the problem as a gender issue.

For long time, violence against women was considered a women's issue only.

Nowadays, however, programs for support, help and counselling focus on men as well. For example, in Sudan, a human and children's rights NGO started to educate police personnel on the rights of women and how the personnel could deal with domestic, and other violence against women. They learn how they should deal with the men who carry out the violence.

So counselling organizations usually work with the perpetrators as well as with the victims.

In war stricken areas in Uganda and Sudan, counsellors are trained as community workers and as 'family workers', as different types of violence affect different family members during the wars.

- Often, when men have to get involved with gender, they react with resistance and disbelief. However, it means they have to confront reality and this is often revealing, awarding and motivating. This can happen for example as the NGO starts to carry out studies with male and female stakeholders about their lives.

On the initiative of the departmental planning office in Bonga, South Ethiopia, a study on the economic contribution of women in the Kafa zone had to be initiated and conducted. This was the first time that gender disaggregated data was collected in the area. From the very beginning men and women were involved. With the assistance of a gender specialist, they developed a plan and a questionnaire. Then they started the field visits and held discussions with villagers and key informants. They also used observation as a tool to get information.

The men were quickly shocked. They had not expected that women had so many tasks and responsibilities and spent so much time daily at work. They also were surprised to learn that women, although often without a completed primary education, could formulate answers and ideas well.

Once they had a clear picture of the gender situation in the field, both men and women could see the need and desirability of change and were motivated to integrate gender in their work.

Step 5. Monitoring and evaluation

The process of change needs continuous monitoring and evaluation. You need to check if you are on the right road or if you have taken a wrong turn. If the results are not what you expected, things may go slowly, people lose motivation and action must be taken. A change process is like a child learning how to walk: falling and getting up again. Do not get discouraged, enjoy the positive outcomes and adapt your strategies on the negative ones

Monitoring

Monitoring is a continuous process for the duration of the project. It is an activity based on data collection. The knowledge and skills required for monitoring are the same as for assessment and analysis.

Monitoring is essential in a changing situation. The purpose of monitoring is to find out whether the program and activities are effective, and how strategies need to be adapted to ensure the best possible results. Simply put: we made a plan; now, are we carrying it out, in good time and using the right means, people and approaches?

Regularly updated information is vital in ensuring that programs remain relevant and effective. Regular monitoring allows managers to determine priorities, identify emerging problems, determine the effect of their responses, and guide revisions to their programs. Regularly updated information means that questions can be asked that have more to do with evaluation – whether, for example the program is really going to affect the problem addressed. Information derived from continual monitoring of programs can be used for reviews, evaluations and other purposes.

What you have to monitor:
- The program and activities, the progress in the implementation;
- The process - how the program is carried out;
- The people;
- The impact and changes in the situation.

Evaluation, on the other hand, is an activity in itself (see Evaluation below). Monitoring and evaluation collect information to improve projects/ programs after they have started. These activities are part of the continuous process of re-evaluating the needs and the appropriateness of responses to the situation and desired changes. Accurate monitoring results can be fed into the evaluation process.

Different tasks in monitoring

Monitoring looks complex but should not be. It helps to use a monitoring system adapted to your needs and situation.

To prepare and plan the monitoring system, you need to think about the following:
- How will you do the monitoring? Who is going to be responsible for what? What is needed – the cost, human and material resources, the means of communication and reporting?

- Setting up an indicators checklist: What do you want to count or measure? Look at the indicators and the time line in your action plan.

Some projects are easier to monitor than others. If you are vaccinating children, you count the kids and calculate the proportion of all children covered and not covered. Changes in attitudes or behaviour are more difficult to monitor, but the use of good indicators from the very beginning will facilitate this process.

- Defining methods for data collection. What will you use? Informal discussion? Key-informants? Written reports? How often will you collect these data? Who will be responsible for the follow up? Information collected should be directly relevant to the program – in other words, it should be useful and acted upon. It should also be documented and made available proactively as needed to other sectors and agencies, and to the affected population.
(For more information you can download: "*Information, its collection and use*" at http://www.networklearning.org/books/collecting-information.html

The means of communication used (dissemination methods, language, etc., must be appropriate and accessible for the intended audience. A report to your donor needs to be official. Information provided to your non-literate stakeholders should be in a form they will understand. In some cases you might decide to have a workshop to present the results, discuss the outcomes, and talk about the next steps.

- Storing data: how and where will you store your data? In a written form, on CDs, computers?
- Analyzing information: who will be responsible, how often will you do it? Who will be involved?
- Reporting: to whom, by whom? How?
- Reflecting, reorienting, redesigning: by whom, when, how?
- Ensuring implementation of the redesigned plans: when, by whom?

For example: One of your indicators is that by December 2007 all staff will have received basic gender training. You want to monitor whether you are making progress and decide to check in June 2007. You will also decide who will be responsible for this checking. You can collect your data from the office human resources database.

Will you write this in your quarterly report? Or summarize it in a your database? Or open a specific database sheet for this information? Which donor(s) needs to be informed? If the result is disappointing, who will be responsible to take action?

Guiding principles for monitoring

- Try to keep to information minimal but key, from important areas, considering who needs to know what. What does the field staff need to know, what is important for the director to know?

For example: The director might want to know how many people were trained and if the process is working. This second issue requires other indicators. He or she does not need to know the names, dates etc. The human resources officer needs to know the names of the trained staff, the dates and might also need financial information.

- Varieties of communication forms are needed. These could be verbal, written, formal or informal. Photographs are always handy to show people what really happened, especially when they show the situation before and after – for example a broken well versus a repaired one. Or a photograph of training.

- Make sure that you can crosscheck information and pass the right information in the right way to the right person.

  For example: you receive a verbal message that the well and water pump in the village have been repaired and the pump is now working well. Your crosscheck method will be that you (or someone else) go to the village and observe if the well is indeed working properly.

- Monitoring can teach you what went well, which was a right method to use, which not, why not. Have the right resources been used? Was the amount of money spent in relation to the outcome?

- Use participatory methods so that people feel involved.

  For example: the community might decide to monitor whether the new wells and pumps are installed in time and whether repairs are made within an acceptable time. Later, after complaints, they add to their list what stakeholders think about: the functionality of the pump; why this one works better or worse than the former one; the taste of the water… and any other comments or suggestions.

- When you discover, by good monitoring, that something does not work, you are obliged to act.

  For example: one of the new wells is not working properly, which means you have to take action to ensure a good operation.

Monitoring often overlaps with evaluation. Some means that can be used for monitoring and evaluation are:
- Discussing and exchanging information with partners and stakeholders;
- Writing reports;
- Using computers for analysis (spreadsheets, databases, statistics, graphics, or combined programs);
- Using diagrams, matrices, graphics, mapping etc;
- Using video, photos;
- Using observation.

You can write your monitor plan in a matrix. Have a look at your action plan, decide what you have to monitor, how and by whom. Use the indicators from your action plan to see if you're on the right road.

Example matrix for monitoring							
Subject/ action	Indicators	Method of Data collection	Who	Frequency of Data collection	Reporting system	Analysis by whom	Redesign by whom
Gender training	**1.** All staff received basic gender training by Dec. 2007	Interview and HR data check	Sarah	2 x: Jun. 2007 Dec. 2007	Computer/ Excel	Omar and Sarah	Omar and Sarah
	2.						

Depending on the findings, you may have to re-visit your objectives and strategies and adapt your action plan.

Evaluation

Evaluation is often the last part of a project or process but at the same time the beginning of the next phase, extension or new proposal.

Three evaluation moments can be distinguished:
1) mid-term, often mixed with monitoring;
2) immediately after the completion of the projects;
3) some time after the completion of the project.

Staff of the organization can do an internal evaluation. An independent outside agency can perform an external evaluation, often at the request of the donor. An evaluation can also be a joint one with staff from the organization and personnel from the outside agency. The organization itself can also clearly indicate what they think is important to evaluate and should certainly be involved in defining the Terms of Reference.

The practice of evaluating one's own effort is a natural one: women will look to see if spots have been removed from shirts after washing, a mechanic will check if the motor he repaired is working properly, a carpenter will run his hands over the wood to decide when a piece is smooth. If not, they might need to change their approach, tool or means.

The purpose of the evaluation is to assess the actual results of an activity. A difference can be made in types of evaluation, like process evaluation, where you look at the process during the project and impact evaluation, where you look at the impact of the project on the target group. The following could be examined during the evaluation:

- **Effectiveness:** To what extent have the objectives been achieved? And at what costs? If objectives were not met, what are the causes behind? Strategies and action used: Which were the strengths in the strategies/ actions? Which the weak points? Are objectives still valid or do these need to be adapted? Which changes need to be made in order to reach the objectives?

- **Efficiency:** Are the costs in proportion to the benefits? These costs refer to resources: human resources, time, energy, money and materials.

  If, for example, a lot of women/men hours were needed to construct the new well and materials for construction had to be imported and were extremely costly, the balance between input and output might not be correct.

  Or suppose a lot of time, effort and money have been spent on gender training, but the acquired skills and knowledge are not being used – this could be a waste of money.

- **Impact analysis:** What has been the impact on the staff, the organization and the stakeholders? What changes have been brought about by the project? These changes can be the ones desired, but also unexpected ones:

In an incoming generation program for women in Dhaka, Bangladesh, one lady, assisted by a loan, managed to start her own vegetable market stall. Every morning, very early, she travelled to the outside of the city, to buy cheap vegetables at a suppliers market. She transported these back to her area, and spent all day selling her vegetables.

> *Business was going well, she could pay back her loan and later extend her market stall. She had a good income, could send her children to school and improve the family diet. Her husband had a regular job, and was also quite happy - he saw his chance. He stopped working, took charge of selling the vegetables, sitting at ease at the stall, just selling and chatting. The woman was forced to do the heavy work, collecting the vegetables in the morning, cleaning up the stall and area at night. Moreover, she now lost control over her income.*
>
> *As this happened regularly, the NGO organizing the loans, decided later that only single women from female-headed households would be eligible for loans.*

During evaluation, be it internal or external, discussions should take place in a participatory way with all stakeholders involved, women and men.

Nowadays an important practice during evaluation is to assess the '*Lessons learnt'*. What went well? What not? Why? What did you learn from the practices and approaches implemented? Which methods worked well, which didn't? Which were the best practices? Which the bad ones? Identification of these lessons will help you with future planning. Best practices can be used again. Not working ones eliminated.

> *A large organization in Sudan provided a village with a borehole and also installed a water pump to provide them with clear and non-contaminated water. In their evaluation they claimed that the new water source was a huge success and that everyone was very happy with their intervention.*
>
> *However, when talking with the women of the village, a different picture arose. They were absolutely unhappy with the new water pump. First of all the new pump was situated far outside the village, so the women had to walk a long distance for collection and carry the heavy water pots back. Secondly, the husbands complained about the bad taste of the water from that well. In the end, the new pump was not used, people returned to the old well even though it was contaminated and with poor supply - but the water had a good taste and was easy to collect.*
>
> *Women had not been involved in the planning, neither in the evaluation. Finally though the organization responsible accepted the "lessons learnt" and increased the involvement of both women and men in planning their projects.*

After the results of the evaluation are known, the best practices and lessons learned have been identified; the whole process of planning and assessing could start again - Step 1. Analysis. Step 2: etc. Usually an evaluation will also provide clear recommendations what and how should be changed.

The general idea behind this new process is directed towards improvement in terms of efficiency, effectiveness and impact of the project/ program.

And finally…
Incorporating gender into your organization is not an easy task. To bring about change is a complicated process and some changes are more difficult than others. Look at the line below from least difficult to most difficult:

Least difficult   *Most difficult*

| Change in knowledge | Change in skills | Change in attitudes | Change in individual behavior | Change in organizational behavior |

However…
What you achieve is rewarding and will contribute to gender equality. **Enjoy the achievements and keep going to reach your not yet attained goals!**

ANNEX 1 REFERENCES AND WEB RESOURCES

References:

- Gender and Development Training Centre (2002) Material from *Training of Trainers in Gender and Development Training Course,* Khartoum
- Gender, Society and Development (2000) *Institutionalizing gender equality: commitment, policy and practice. A global source book*, Amsterdam: Royal Tropical Institute
- Lingen, Annet, *Gender Assessment Studies, a manual for gender consultants*, The Hague, ISSAS
- Macdonald, Mandy; Sprenger, Ellen; Dubel, Irene (1997) *Gender and organizational change: Bridging the gap between policy and practice*, Amsterdam: Royal Tropical Institute
- March, Candida (1996) *Concepts and Frameworks for Gender Analysis and Planning, a Toolkit,* Haarlem: Gender & Development Training Centre
- Posavac, Emil J; Carey, Raymond G (1996) *Program Evaluation, methods and case studies*, New Yersey: Prentice Hall
- Rao, Aruna; Stuart, Rieky; Kelleher, David. *Gender at Work,* Kumarian Press

Web resources:

www.awid.org
Association for Women's Rights in Development
Look at the Forum website: How does change happen? Also more sites with gender information. On the forum website (via homepage) a Paper on Institutions, Organizations and Gender Equality by Aruna Rao

www.cngo.org.np
Site from the Canada Nepal Gender in Organizations (CNGO): Training packages on various subjects, like Gender Awareness/ Gender and Development/ Gender friendly Organizational Development etc.
All material is presented in PDF files and free to download.

www.genderatwork.org
News on gender issues and various publications (PDF files for free downloading)

www.siyanda.org/forumdocs/si20030708110716.doc
A report from a project in Jordan on Gender and Organizational Development

www.sflp.org/eng/007/pub1/bul19_art2.htm
A bulletin from the Sustainable Fisheries Livelihoods Programme on Co-management, gender and organizational development

www.tgnp.org
Tanzania Gender Networking Programme
Various information on Gender and on Training Courses on Gender and Organizational Development

ANNEX 2 TOOLS

Gender checklists for the Project Cycle:
Quite a few are available on the Internet. The following are examples. Type 'Gender and the Project Cycle' in your search machine and you'll have a wide choice of sites.

www.brazil.accc.ca/english/gender/guidelines/index.htm
Gender Equality Project Cycle and "How to implement Guide'

www.gdrc.org/gender/framework/g-framework.html
Gender Analysis Framework. Looking at Activity Profile, Access and Control Profile, Analysis of factors and trends, Program Cycle Analysis

www.ifad.org/gender/thematic/livestock/live_ap2.htm
Minimum requirements for Incorporating Gender Issues into IFAD's Project Cycle

www.networklearning.org
The Project Cycle, a Gender Checklist

www.unifempacific.com/resources/publications/considerations/g_considerations.htm
Gender issues in Project consideration. Summary of critical points and detailed checklist for Gender Integration in the Project Cycle.

Strategic planning:
The following reference is a practical guide for strategic planning, providing clear information, a step-by-step approach and worksheets.

Strategic Planning for Nonprofit Organizations:
A Practical Guide and Workbook.
Michael Allison/ Jude Kaye
Support Center for Nonprofit Management
John Wiley & Sons, Inc., New York
Website: www.supportctr.org

Pictures:
We would like to thank the IIED for the use of the cartoon pictures by Regina Faul-Doyle, from:
Pretty, Jules N.; Guijt, Irene; Scoones, Ian; Thompson, John,(1995) **A Trainer's Guide for Participatory Learning and Action,** London: IIED.