

# GENDER TOOLS

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This overview is a selection of existing gender tools. Some of the most recent as well as more 'classic' tools are included.

In order to obtain a successful process of gender mainstreaming, the use of tools only is not sufficient, some preconditions need to be fulfilled. The most important are: sufficient technical capacity, a gender friendly organisational culture, accountability and political will.

I want to thank Gudule Boland, Ireen Dubel, Jeannette Kloosterman, Roel Snelder and Tessa Roorda for their contributions.

Annette Evertzen

GADE

[www.gade-gender.nl](http://www.gade-gender.nl)

December 2009

Update February 2011.

## **I ON THE PROJECT LEVEL**

### **1. GENDER MAINSTREAMING IN GENERAL**

#### **What can you find here?**

This section provides a general overview of tools for mainstreaming gender into the project cycle.

The tools show key questions and points for identification, planning, execution, monitoring and evaluation of projects.

#### **When to use it?**

The tools cover different steps of the project cycle. Some tools also include information about organisational change.

Derbyshire, Helen

*Gender manual. A practical guide for development policy makers and practitioners.*

London: Department for International Development (DFID), 2008.

<http://www.dfid.gov.uk/Documents/publications/dfid-gender-manual-2008.pdf>

This manual is divided into three main sections.

Section 1: Background ideas and concepts.

Section 2: Mainstreaming gender in the policy / programme cycle.

Section 3: Tools and guidelines on the processes of gender mainstreaming. This section gives information about statistics and analysis; voice and accountability; policy action and resources; and, organisational and individual change.

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FAO - Food and Agriculture Organisation of the United Nations

*Project cycle management. Technical guide.* Rome: FAO, 2001.

[www.fao.org/sd/seaga/downloads/EN/projecten.pdf](http://www.fao.org/sd/seaga/downloads/EN/projecten.pdf)

This guide gives an overview from project cycle to evaluation, and contains several practical case studies.

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FAO - Food and Agriculture Organisation of the United Nations

*Intermediate-level handbook.* Rome: FAO, 2001.

<http://www.fao.org/sd/seaga/downloads/En/Intermediateen.pdf>

The purpose of the Intermediate Handbook is to support participatory development for those who play an intermediary role between government policy makers, and individuals and households at the community level.

The tools in this handbook are designed to build capacity to:

- include socio-economic and gender considerations in planning, implementation and monitoring and evaluation in intermediaries,
  - promote internal participatory processes within intermediaries, including within organisational processes, and
  - build more participatory methods for working with development partners and stakeholder groups.
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Global Finland

*Training package for the promotion of gender equality in NGO development cooperation.* Global Finland , 2004.

<http://global.finland.fi/gender/ngo/english/>

This training package provides NGOs engaged in development cooperation with basic information about gender perspective and practical advice on how gender equality can be promoted through NGO projects. With the help of concepts, examples and exercises dealing with gender equality and project cooperation, NGOs are offered basic training that will improve the abilities of their own projects to reduce gender inequalities. The reduction of inequalities through projects also improves the quality and impact of development cooperation.

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SDC - Swiss Agency for Development and Cooperation

*Gender Tool Kit - instruments for gender mainstreaming.* The premise upon which the guidelines are based is experiential learning. SDC.

[http://www.sdc.admin.ch/en/Home/Themes/Gender/General\\_and\\_thematic\\_tools/Gender\\_Tool\\_Kit](http://www.sdc.admin.ch/en/Home/Themes/Gender/General_and_thematic_tools/Gender_Tool_Kit)

This website contains text and tools (key questions) with regard to definitions; strategies; gender analysis; analytical framework; gender in household and community analysis; gender in country, policy and sector analysis; gender in country programmes; gender in programmes and projects; gender in project cycle management and logical frameworks; gender and monitoring; gender and evaluation, etc.

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UNDP - United Nations Development Programme

*Gender mainstreaming in practice. A handbook.* UNDP RBEC, 2007.

<http://europeandcis.undp.org/home/show/6D8DE77F-F203-1EE9-B2E5652990E8B4B9>

This handbook starts with ten steps to integrating gender into the policy-making process, followed by a guide to gender analysis.

The following part - the Gender Briefs - is designed to highlight the main issues and links between gender and a specific policy area: poverty; labour; macroeconomics and trade; private sector development; education; health; energy and environment; governance and participation; human rights and justice; science, research and information and communication technologies; crisis prevention and recovery; HIV and Aids.

Each sub-issue discussed in the Gender Briefs is divided into sections that provide different types of information. The sections are as follows: What is the Issue? What is the

goal? Why bother? Possible interventions and entry points; Measuring progress; References.

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## 2 GENDER ANALYSIS

### What can you find here?

This chapter contains frameworks to analyse gender roles and relations with respect to the target group. The Harvard framework is a real 'classic' and many frameworks thereafter are adaptations, extensions and improvements of this framework.

A gender analysis at project level gives insight in how tasks and responsibilities are divided between household members: who does what and when is it done? It gives information on the ways in which women's access to and control over resources such as land, income, inheritance and political influence is less than men's. In some tools a simple context analysis has been included.

The tool provides project staff with information about gender roles and power relations and the possible impact of project interventions on the gender relations. It helps to design just those interventions where most impact can be expected

If the tools are mixed with a participatory process, it can be an important step to create more gender awareness amongst the participants.

### When to use it?

A gender analysis should be done before the start of a project. The analysis can be repeated later on to capture change.

**For online descriptions** of different tools and comparisons, see:

DFID [http://www.siyanda.org/docs\\_gem/index\\_implementation/pf\\_coretext.htm](http://www.siyanda.org/docs_gem/index_implementation/pf_coretext.htm)

### General toolkits

Aguilar, L.; Briceño-Ilsie, G.; Valenciano, I.

*Seek... and ye shall find. Participatory appraisals with a gender equity perspective.* San José: Costa Rica: World Conservation Union, Arias Foundation for Peace and Human Progress, 2000. (Toward Equity Series, module 2).

<http://generoyambiente.com/arcangel2/documentos/419.pdf>

This guide contains: principal approaches in participatory appraisals; theoretical foundations of the appraisal process; steps or stages; and, work tools.

The techniques and tools include: ice breakers and energizers; techniques for understanding the general situation of a community; techniques for identifying the perceptions and assessments of women and men (socialisation); techniques for identifying division of labour; techniques for analysing access, use and control of benefits and resources; techniques for prioritising community problems; and, conventional techniques for information gathering.

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March, C.; Smyth, I.; Mukhopadhyay, M.

*A guide to gender analysis frameworks*. London: Oxfam, 1999.

[http://books.google.nl/books?id=4JBHy\\_ObO2UC&pg=PA50&lpg=PA50&dq=gender+%22access+and+control%22&source=bl&ots=1ys\\_Xa4T0i&sig=THBZCIWT-l\\_k0MMZbIpvAJeKULU&hl=nl&ei=VNn6SoWfDYfT-QbTmLWoDw&sa=X&oi=book\\_result&ct=result&resnum=9&ved=0CDQQ6AEwCA#v=onepage&q=gender%20%22access%20and%20control%22&f=false](http://books.google.nl/books?id=4JBHy_ObO2UC&pg=PA50&lpg=PA50&dq=gender+%22access+and+control%22&source=bl&ots=1ys_Xa4T0i&sig=THBZCIWT-l_k0MMZbIpvAJeKULU&hl=nl&ei=VNn6SoWfDYfT-QbTmLWoDw&sa=X&oi=book_result&ct=result&resnum=9&ved=0CDQQ6AEwCA#v=onepage&q=gender%20%22access%20and%20control%22&f=false)

This book contains step-by-step instructions for using different gender-analysis frameworks. Each framework is accompanied by a commentary that looks at the advantages as well as the potential pitfalls and offers ideas for further reading. The frameworks are also placed within the wider context of gender and development work and a definition of key concepts is provided.

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Miller, C.; Razavi, S.

*Gender analysis. Alternative paradigms*. 1998.

<http://nird.ap.nic.in/clic/rrdl89.html>

This study provides a comparative analysis of a number of conceptual frameworks used for analysing gender issues within the development context. It highlights the strengths and weaknesses that each framework entails, using four criteria: the understanding of gender, its approach to development, the extent to which the frameworks can offer insights into different institutions, and the level of development intervention at which the frameworks are pitched. Miller also discusses work of feminist economists who are applying gender analysis to the macro-economic level.

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UNDP - United Nations Development Programme / Gender and Development Programme  
*Gender analysis*. UNDP Learning and Information Pack - Gender Mainstreaming. New York: UNDP. 2001.

<http://www.gdrc.org/gender/mainstreaming/2-GenderAnalysis.doc>

The Information Pack of UNDP contains a copious and interactive document with regard to gender analysis. The Information pack comprises three sections:  
Section 1 consists of four sets of slides with a brief commentary on each. The slides set out key points for the reader: what is gender analysis, how can gender analysis and policy be linked, what are the key concepts and tools in social and gender analysis, men and masculinity in gender analysis.  
Section 2 includes resources such as reading materials, handouts and worksheets to amplify the issues raised in the slides. All the well-known frameworks are described and discussed. To link gender analysis with policy and programmes some other tools are included: Decision-making, SWOT Analysis, and Force Field Analysis  
Section 3 includes references to internet and other resources on related issues.  
Full size slides, which can be used for presentations, are in the back of the manual.

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## **Agriculture and subsectors**

Asian Development Bank

*Gender analysis framework for agriculture.*

[http://www.adb.org/Documents/Manuals/Gender\\_checklists/Agriculture/agri0400.asp](http://www.adb.org/Documents/Manuals/Gender_checklists/Agriculture/agri0400.asp)

Contains checklists for many aspects of agriculture and for subsectors (irrigation; fisheries; forestry and watershed management; integrated rural development; micro-finance; gender issues in industrial crops and agro-industry; livestock).

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FAO - Food and Agriculture Organisation of the United Nations

*Socioeconomic and gender analysis (SEAGA). A toolbox. Field handbook.* Rome: FAO, 2001.

[http://www.fao.org/sd/seaga/index\\_en.htm](http://www.fao.org/sd/seaga/index_en.htm)

The purpose of this Handbook is to support participatory development planning at community level, to:

- Identify key development patterns,
- Understand the livelihood strategies of different people, and
- Build consensus about development priorities and action plans.

The toolkits consist of a number of rapid rural and participatory rural appraisal tools, and include also a series of SEAGA questions to facilitate and deepen analysis.

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## **Gender in value chain analysis**

Gender in Value Chains. Agri-ProFocus Learning Group

<http://genderinvaluechains.ning.com>.

This website contains a lot of information about gender in value chain analysis, including:

- *Guideline Action-Learning Plans Gender in Value Chains*
  - A collection of tools: [http://feeds.delicious.com/v2/rss/tag/apf\\_gender](http://feeds.delicious.com/v2/rss/tag/apf_gender)
  - 
  - A short introduction in the gender value chain analysis: <http://genderinvaluechains.pbworks.com>
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## **3 GENDER PLANNING**

### **What can you find here?**

This chapter gives tools for gender sensitive planning. It shows how to organise participative planning that takes into account men and women's specific wishes, needs

and interests. Some tools are specifically meant to integrate gender issues in the logical framework.

#### **When to use it?**

In planning processes at the local level, with the participation of the target group.

Aguilar, L.

*A good start makes a better ending. Writing proposals with a gender perspective.* San José: Costa Rica: World Conservation Union, Arias Foundation for Peace and Human Progress, 1999. (Toward Equity Series, module 1).

<http://generoyambiente.com/arcangel2/documentos/418.pdf>

This manual contains: why projects need to have a gender equity perspective; basic considerations for mainstreaming a gender equity perspective in the project proposal; and, recommendations for incorporating a gender equity perspective during project preparation.

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Alfaro Quesada, C.

*If we organize it, we can do it. Project planning with a gender perspective.* San José: Costa Rica: World Conservation Union, Arias Foundation for Peace and Human Progress, 2000. (Toward Equity Series, module 3).

<http://generoyambiente.com/arcangel2/documentos/420.pdf>

Seven steps for project identification and formulation are dealt with in this guide: understanding planning; definition of the primary purpose; identification of strengths and weaknesses, opportunities and threats (SWOTS); identification of priority problem(s); expectations to accomplish; identification of possible solutions; preparation of a tentative plan

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#### **Engendered logframes**

FAO Food and Agriculture Organisation / ISNAR - International Service for National Agricultural Research

*Training manual on gender analysis for monitoring and evaluation . The 'Engendered Logframe' approach.* FAO / ISNAR, 2001.

[http://www.fao.org/WAICENT/FAOINFO/SUSTDEV/dim\\_pe1/pe1\\_040702\\_en.htm](http://www.fao.org/WAICENT/FAOINFO/SUSTDEV/dim_pe1/pe1_040702_en.htm)

This training manual to integrate gender issues in the logical framework includes learning objectives for each day's activities; descriptions of the training approach, methods, and techniques; master copies of handouts, worksheets, overhead transparencies, and additional reading materials that can easily be copied and distributed to others who might be interested. There are also evaluation sheets and a recommended bibliography for use by the trainers. Material has been gathered from many sources; these are acknowledged wherever possible.

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Odame, H.H.

*Engendering the Logical Framework*. ISNAR, 2001.

[http://ec.europa.eu/europeaid/evaluation/methodology/examples/lib\\_too\\_dpm\\_two\\_en.pdf](http://ec.europa.eu/europeaid/evaluation/methodology/examples/lib_too_dpm_two_en.pdf)

This paper describes the potential of the logframe for R&D monitoring and evaluation, taking into account gender roles and relations. The conventional use of the logframe warrants critique because it has often been "gender blind" with insufficient attention paid to the nature of the process behind its preparation and use.

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SDC - Swiss Agency for Development and Cooperation

*Gender Tool Kit - instruments for gender mainstreaming*.

[http://www.sdc.admin.ch/en/Home/Themes/Gender/General\\_and\\_thematic\\_tools/Gender\\_Tool\\_Kit](http://www.sdc.admin.ch/en/Home/Themes/Gender/General_and_thematic_tools/Gender_Tool_Kit) → gender in PCM and logical frameworks.

This website contains text and tools with respect to gender in project cycle management and logical frameworks.

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## 4 GENDER MONITORING AND EVALUATION

### What can you find here?

Tools to integrate a gender approach into existing monitoring and evaluation mechanisms of projects, can be found in this chapter.

The main issues are the use of sex-disaggregated data, the use of gender indicators, and methods to involve men and women of the target group in the monitoring and evaluation of their projects. The tools learn to distinguish between sex-disaggregated statistics, which gives the straightforward numbers of males and females in a given population, and gender data, which can reveal the relationships between women and men that underlie the numbers. Gender-sensitive indicators provide evidence of (changes in) the situation and position of women, relative to the status of men.

### When to use it?

To monitor and evaluate projects at the local level, some tools include evaluations at the institutional and government level.

### Gender-sensitive monitoring and evaluation

Brambila, Paola.

*Gender and monitoring. A review of practical experiences*. Paper prepared for the Swiss Agency for Development and Co-operation (SDC). Brighton: BRIDGE, 2001.

<http://www.bridge.ids.ac.uk/reports/re63.pdf>

This report aims to provide a practical tool that can be used to integrate a gender approach into existing monitoring and evaluation mechanisms. This paper first defines M&E, goes on to look at how indicators can be made gender-sensitive, who should be involved in this process, and at which point in the project cycle. Case studies follow the implementation of such approaches at field level (projects and programmes), institutional and government level. The paper concludes with some recommendations and suggestions.

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Rodríguez, G.

*Taking the pulse of gender. Gender sensitive systems for monitoring and evaluation.* San José: Costa Rica: World Conservation Union, Arias Foundation for Peace and Human Progress, 2000. (Toward Equity Series, module 4).

<http://generoyambiente.com/arcangel2/documentos/421.pdf>

The module contains theoretical elements on the subject as well as contributions to implement gender sensitive monitoring and evaluation systems. The steps to be followed towards system implementation include tools with regard to: decision making; participants' selection; variables and indicators; scales of performance; data collection tools; data processing and report preparation.

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United Nations Development Program (UNDP) / United Nations Development Fund for Women (UNIFEM)

*A user's guide to measuring gender-sensitive basic service delivery.* UNDP / UNIFEM, 2009.

[http://www.undp.org/oslocentre/docs08/users\\_guide\\_measuring\\_gender.pdf](http://www.undp.org/oslocentre/docs08/users_guide_measuring_gender.pdf)

This guide is intended to contribute to the development and more effective use of gender-sensitive indicators so that services are delivered more efficiently and effectively to women. It should be seen as a generic and basic tool to map and analyse governance of basic service delivery from a gender perspective. It includes indicators and measurement tools developed by multilateral and bilateral agencies as well as by national counterparts. The guide also presents examples of newly developed and innovative measurement initiatives in women's access to public services.

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World Bank

*Toolkit. Integrating a gender dimension into monitoring & evaluation of rural development projects.* World Bank, 2005

[http://siteresources.worldbank.org/INTGENDER/Resources/RuralM\\_EToolkit2005.pdf](http://siteresources.worldbank.org/INTGENDER/Resources/RuralM_EToolkit2005.pdf)

This toolkit from the World bank contains two parts:

Part I: General guidelines for integrating gender in M&E.

Part II: Thematic briefs on rural sub-sectors, containing result frameworks and checklists of gender-related issues and activities during the project cycle.

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## Gender-sensitive indicators

Beck, Tony.

*Using gender-sensitive indicators. A reference manual for governments and other stakeholders.* London: The Commonwealth Secretariat, 1999.

[http://www.thecommonwealth.org/shared\\_asp\\_files/uploadedfiles/%7BD30AA2D0-B43E-405A-B2F0-BD270BCEFBA3%7D\\_ugsi\\_ref.pdf](http://www.thecommonwealth.org/shared_asp_files/uploadedfiles/%7BD30AA2D0-B43E-405A-B2F0-BD270BCEFBA3%7D_ugsi_ref.pdf)

Contains: Developing a national-level database of gender-sensitive indicators; gathering and using gender-sensitive indicators; the state of the art; good practice case studies in the development of gender-sensitive indicators.

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Moser, A.

*Gender and indicators. Overview report.* Brighton: BRIDGE, 2007.

<http://www.bridge.ids.ac.uk/reports/IndicatorsORfinal.pdf>

What does a world without gender inequality look like? Realising this vision requires inspiring and mobilising social change. But what would indicate we are on the right track - and how will we know when we get there? Gender-sensitive indicators and other measurements of change are critical - for building the case for taking gender (in)equality seriously, for enabling better planning and actions, and for holding institutions accountable for their commitments on gender.

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Escalante, Ana Cecilia; Rocío Peinador, María del.

*Eyes that see...hearts that feel. Gender indicators.* San José: Costa Rica: World Conservation Union, Arias Foundation for Peace and Human Progress, 1999. (Toward Equity Series, module 6).

<http://generoyambiente.com/arcangel2/documentos/423.pdf>

The book describes the process followed to construct gender equity indicators and defines important concepts. "Key situations" or "triggers" are transformed into suggestions and actions that rural development initiatives can incorporate in their activities to promote gender equity. A set of gender indicators is given according to the following dimensions: work, resources, education/training, health, social relations, personal growth and quality of life, and organisation/ project. The last chapter contains methodology and steps for applying this proposal and the construction of a definitive system of gender equity indicators for rural development initiatives.

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FAO - Food and Agriculture Organisation of the United Nations

*Gender sensitive indicators: A key tool for gender mainstreaming.* Rome: FAO - Women in Development Service (SDWW), 2001.

[http://www.fao.org/sd/2001/PE0602a\\_en.htm](http://www.fao.org/sd/2001/PE0602a_en.htm)

This article gives an introduction to recent work of FAO on the use of gender-sensitive indicators for gender mainstreaming. Such indicators provide an effective mechanism to

ensure that programmes and projects give due consideration to the different roles and responsibilities of different members of the society. These differences are often overlooked, yet crucial to the success of any development effort. A more comprehensive paper on indicators is being prepared for publication soon.

## **II ON THE ORGANISATIONAL LEVEL**

### **5 GENDER APPROACHES**

#### **What can you find here?**

Five women in development (WID) approaches can be identified - welfare, equity, anti-poverty, efficiency and empowerment. The first four were influenced by dominant development paradigms, mainly espoused by donors such as the World Bank and USAID, whereas the last, empowerment, arose from women in the developing world. The most recent approach is the gender mainstreaming approach. This approach emerged from criticisms of WID approaches (women's status did not improve and gendered power relations were not addressed) and the adoption of gender and development.

#### **When to use it?**

The analysis of approaches can be used to analyse the vision of an organisation with respect to gender and development. It also shows if visions and projects / programmes are consistent.

Royal Tropical Institute

*Facilitators guide for gender training*. KIT / Kónsnet, 2009/

<http://www.konsnet.dk/Default.aspx?ID=18648>

Contains a tool and a presentation with respect to the different approaches which are part of a gender training.

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Williams, S.; Seed, J.; Mwau, A.

*The Oxfam gender training manual*. Oxford: Oxfam, 1994.

[http://books.google.nl/books?id=aF2BZ97ZEYsC&pg=PR11&lpg=PR11&dq=Oxfam+gender+training+manual&source=bl&ots=nYmckN9kTV&sig=A1FEEvno0l6x-ntHS-kn32CGCAs&hl=nl&ei=2ev6SoHTM8bb-QaJ3r2oDw&sa=X&oi=book\\_result&ct=result&resnum=3&ved=0CBAQ6AEwAg#v=onepage&q=&f=false](http://books.google.nl/books?id=aF2BZ97ZEYsC&pg=PR11&lpg=PR11&dq=Oxfam+gender+training+manual&source=bl&ots=nYmckN9kTV&sig=A1FEEvno0l6x-ntHS-kn32CGCAs&hl=nl&ei=2ev6SoHTM8bb-QaJ3r2oDw&sa=X&oi=book_result&ct=result&resnum=3&ved=0CBAQ6AEwAg#v=onepage&q=&f=false)

This gender training manual contains on p. 219 a tool to understand different approaches with respect to gender and development. Especially the overview on p. 226 is useful to learn more about the history and goals of the different approaches.

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### **6 GENDER ASSESSMENTS**

### **What can you find here?**

Gender assessments are meant to analyse strong and weak point of organisations with respect to gender mainstreaming.

Especially two methods are in use in the Netherlands: a method developed by the Gender & Development Training Center for SNV, and later adapted for HIVOS and the ILO. And the Nine-box tool, used by NOVIB and KIT.

The tool analyses different aspect of organisations to reveal strong and weak points with respect to gender mainstreaming and prioritising actions to improve. Part of the analysis are: vision and mission; activities; structures and processes; capacity and capacity; decision making; organisational culture; accountability; HRM, etc.

### **When to use it?**

It can be used by organisation to assess the state of art and develop a strategy for further actions to undertake in order to improve what they are doing.

Evertzen, A.

*Organisation and project assessment*. GADE, 1998.

<http://www.gade-gender.nl/Engels/gade-gender-assessments.htm>

In this participative assessment strengths and weaknesses are analysed to improve working with a gender approach. The aim of the assessment is to reinforce the strengths with regard to gender and to transform the weaknesses into positive activities thus creating a concrete and realistic strategy that can contribute to more equal gender relations. The instrument contains tables that are completed by the organisation's staff during a workshop (2 days), or by means of an (e-mail) inquiry. The analysis contains 3 sections: organisation analysis; and at the project level: participation analysis, and impact analysis.

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Gender & Development Training Center; adapted by A. Evertzen

*Gender Self-Assessment tool*. The Hague: SNV, 2001.

CD-Rom For information: [gade-gender@planet.nl](mailto:gade-gender@planet.nl)

The Gender Self-Assessment (GSA) methodology is a comprehensive tool, consisting of a set of methods to be used in workshop sessions with groups of participants, preferably teams that work together. After introducing the assessment and an explanation about the organisation of an assessment, the following issues are dealt with: the policy, strategy and assignments concerning mainstreaming for gender equity and women's empowerment; gender capacity, competence and capacity building; knowledge/information management; systems and instruments (analysis, planning monitoring/reporting, evaluation, quality control, personnel management, financial management, etc); partner organisations and client appreciation; organisational culture; perceptions of achievement. The CD-Rom also contains adaptations of the assessment that are used in different countries, and a tool (by E. van den Berg) especially for partner organisations.

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ILO - International Labour Office

*A manual for gender audit facilitators. The ILO participative gender audit methodology*.

Geneva : ILO, 2007.

<http://www.ilo.org/dyn/gender/docs/RES/536/F932374742/web%20gender%20manual.pdf>

The Manual is a step-by-step guide to the participatory gender audit process. Part One gives an overview of the four pillars on which the participatory methodology is based. It outlines 12 key focus areas for collecting the information that will be needed throughout the audit and for guiding the formulation of the recommendations. Part Two provides all the practical information (what, how, when and with whom) related to the audit process. Part Three comprises a set of participatory workshop exercises with detailed instructions on the objectives, the materials needed and the outcome expected. It also includes suggestions on how to adapt the exercises according to the needs and structure of the audited unit. Part Four covers the last two segments in the audit process: "At the end of the audit" and "After the audit" and describes what needs to be addressed, including report writing.

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Merill-Sands, D., and Scherr, S. (2001). *Center self-assessment for a woman-friendly workplace*. WASHINGTON: CGIAR.  
[http://www.genderdiversity.cgiar.org/publications/genderdiversity\\_WP29.pdf](http://www.genderdiversity.cgiar.org/publications/genderdiversity_WP29.pdf)

This self-assessment survey is designed to assist the CGIAR Centers to establish an initial benchmark and to monitor progress by creating the conditions that support a woman-friendly work environment. It seeks to qualitatively assess the organisational climate for gender equity.

This paper first presents the analytical framework underpinning the design of the survey: the critical aspects of a woman-friendly workplace. The following sections present the gender equity indicators used in the survey and two distinct methods for using the survey for self-assessment.

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Mukhopadhyay, M. , Steehouwer, G. , Wong, F.  
*Politics of the Possible. Gender mainstreaming and organisational change. Experiences from the field*. Amsterdam: KIT Publishers,  
[http://www.kit.nl/net/KIT\\_Publicaties\\_output/ShowFile2.aspx?e=916](http://www.kit.nl/net/KIT_Publicaties_output/ShowFile2.aspx?e=916)

The nine-box tool can be found in the annex, on page 132-138.

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SDC - Swiss Agency for Development and Cooperation  
Gender Tool Kit - instruments for gender mainstreaming  
[http://www.sdc.admin.ch/en/Home/Themes/Gender/General\\_and\\_thematic\\_tools/Gender\\_Tool\\_Kit](http://www.sdc.admin.ch/en/Home/Themes/Gender/General_and_thematic_tools/Gender_Tool_Kit) → gender in organisations

This website contains a checklist with respect to gender in organisations.

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## 7 GENDER TRAINING

### What can you find here?

Capacity building for staff of development organisations. The training is meant to raise awareness of the why and how of gender mainstreaming and women's empowerment; participants also learn how to use tools.

### When to use it?

For people without gender knowledge. Follow-ups for people with gender knowledge to deepen their understanding and to keep gender on the agenda.

Mukhopadhyay, M.; Wong, F.

*Gender training. The making and remaking of gender knowledge. A global sourcebook.* Royal Tropical Institute, Oxfam GB, 2007.

[http://www.kit.nl/net/KIT\\_Publicaties\\_output/ShowFile2.aspx?e=1031](http://www.kit.nl/net/KIT_Publicaties_output/ShowFile2.aspx?e=1031)

This book explores the explicit and, more often, implicit assumptions in gender training about the nature of knowledge, imparting knowledge and knowing. Individual chapters focus on case studies from India, the Machreq / Maghreb region, Uganda and the Francophone world.

The book also includes an annotated bibliography of almost 150 resources on gender training (with author, organisation and geographical indexes) and a list of web resources.

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Royal Tropical Institute

*Facilitators guide for gender training.* KIT / Kónsnet, 2009.

<http://www.konsnet.dk/Default.aspx?ID=18173>

The guide is divided into four modules, each of which includes a number of sessions, as well as a description of suggested exercises including ice breaker and energizer activities. The modules are: introduction to gender and development; gender analysis and planning; gender mainstreaming and organisational change; and, advocacy and change. The manual contains PPT-presentations, handouts, resources and instructions.

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Williams, S.; Seed, J.; Mwau, A.

*The Oxfam gender training manual.* Oxford: Oxfam, 1994.

[http://books.google.nl/books?id=aF2BZ97ZEYsC&dq=oxfam+gender+training+manual&printsec=frontcover&source=bl&ots=nYmdJQckWY&sig=uZwyNdAvJ0QxAgLMtCNEYdmmxXs&hl=nl&ei=LBUJS8L1FsbD-QbqjoHGDQ&sa=X&oi=book\\_result&ct=result&resnum=3&ved=0CBIQ6AEwAg#v=onepage&q=&f=false](http://books.google.nl/books?id=aF2BZ97ZEYsC&dq=oxfam+gender+training+manual&printsec=frontcover&source=bl&ots=nYmdJQckWY&sig=uZwyNdAvJ0QxAgLMtCNEYdmmxXs&hl=nl&ei=LBUJS8L1FsbD-QbqjoHGDQ&sa=X&oi=book_result&ct=result&resnum=3&ved=0CBIQ6AEwAg#v=onepage&q=&f=false)

This extensive manual was one of the first gender training manuals and is still in use. It includes brief explanations of key concepts, tools for gender analysis, analytical frameworks and directions on how to set up a gender training workshop. The manual contents: key concepts; facilitators' guidelines; training techniques; sharing work experience; consensus on development; gender awareness and self-awareness; building gender awareness; self-awareness for men and women; gender roles and needs; women in the world; gender and development; gender-sensitive appraisal and planning; analytical frameworks; case studies. It also contains tools with respect to specific themes: gender and global issues; gender and conflict; gender and environment; gender and economic crisis; gender and culture; working with women and men.

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## **8 GENDER BUDGETING**

### **What can you find here?**

Gender budgeting provides in a gender analysis of budgets. The tool can increase the transparency of budgets, it can make visible what resources and services are allocated to what projects, and who (women or men) benefits. It is meant for governments, but can – if adapted – also be used by NGO's.

### **How to use it?**

To analyse the budget and to monitor performance delivery.

Tools for the governmental budgets can be found at:

<http://www.gender-budgets.org/>

### **III BETWEEN PARTNER ORGANISATIONS**

To stimulate gender mainstreaming in partner organisations and their projects the following tools can be used:

- Dialogue with partners (see the resource below from SDC)
- Signing a charter (see the resource below from SDC)
- Capacity building (see chapter 7 and the resource below from SDC)
- Organisational scans (see chapter 9)
- Gender assessments (see chapter 6)
- Input and outreach tools (see chapter 10, and annex A about sex-disaggregated data)
- Evaluation and impact studies

SDC - Swiss Agency for Development and Cooperation

*Gender Tool Kit - instruments for gender mainstreaming*

[http://www.sdc.admin.ch/en/Home/Themes/Gender/General\\_and\\_thematic\\_tools/Gender\\_Tool\\_Kit](http://www.sdc.admin.ch/en/Home/Themes/Gender/General_and_thematic_tools/Gender_Tool_Kit)

This website contains the chapter gender and partners with strategies and key questions.

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## **9 ORGANISATIONAL SCAN**

### **What can you find here?**

An organisational scan is an instrument to standardize the elements on which a decision on acceptance of and support to a partner's proposal is based. The scan contains specific questions and indicators on gender and is a tool to promote gender mainstreaming across sectors and programmes.

### **How to use it?**

These scans are carried out at the stage where (potential) partner organisations submit a programme proposal for funding.

*ICCO: O-scan.*

For ICCO, the gender questions are integrated into their O-scan, and they concern whether the partner organisation has a gender policy and whether the partner systematically monitors impact on gender. In addition, gender issues are also part of questions related to the planning, monitoring and evaluation system, the human resource policy, the work place policy, and the context analysis.

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*Hivos: Gender performance measurement.*

The gender questions are brought together in the *Gender performance measurement* (GPM). This consists of ten essential indicators, of which five relate to the organisational and five to the programmatic level. Four of the ten questions are considered key questions, and these concern the ones related to the organisational objectives, the presence of internal gender expertise, the programme objectives and the use of gender disaggregated data in the partner's annual report.

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*Oxfam Novib: Gender traffic light.*

The *Gender traffic light* compasses questions on both the programmatic and organisational level.

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Eerdewijk, A. van  
*Energies and (dis)connections. The practice of gender mainstreaming in Dutch development cooperation.* In: Papers expert meeting taking stock, p. 31-62. DPRN, 2009. [http://www.iiv.nl/epublications//2009/Taking\\_stock.pdf](http://www.iiv.nl/epublications//2009/Taking_stock.pdf)

The organisational scans of ICCO, Hivos and Oxfam Novib are discussed in this paper. The tools themselves can be found on p. 60-61.

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## **10 INPUT AND OUTREACH TOOLS**

### **What can you find here?**

These tools guarantee that a fixed part of the resources contribute to women's empowerment and gender equality. They visualize which part of the budget contributes directly to women's empowerment or gender equality, or the number of women reached by the programmes.

Input targets can be formulated with respect to both the budget for the stand alone gender programmes and for the mainstreaming process for which other programmes have to spend a set percentage on gender.

Outreach targets define the percentage of women among the beneficiaries of non-gender specific programmes.

### **How to use it?**

To analyse the budget or the percentage of women beneficiaries and to monitor performance delivery.

### **Input targets**

### *Hivos*

Hivos developed a tool to screen whether 15% of their budget (minus overhead) goes to their programme that support women's organisations. Besides, Hivos has decided that at least 15% of the resources of all non-gender programmes has to be spend their resources on activities/programmes that support women's empowerment or contribute to gender equality. For more information: [i.dubel@hivos.nl](mailto:i.dubel@hivos.nl)

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### *Oxfam Novib*

In the case of Oxfam Novib, the gender budget is defined in the resources (15% of the budget) which have to be spent on Aim 5: Rights and security for women. For more information: [Jeanette.Kloosterman@oxfamnovib.nl](mailto:Jeanette.Kloosterman@oxfamnovib.nl)

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### **Outreach targets**

#### *Oxfam Novib*

Oxfam Novib has not specified an input target for the non-gender programmes. Yet, it has defined that 70% of all its beneficiaries should be women. For more information: [Jeanette.Kloosterman@oxfamnovib.nl](mailto:Jeanette.Kloosterman@oxfamnovib.nl)

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Eerdewijk, A. van

*Energies and (dis)connections. The practice of gender mainstreaming in Dutch development cooperation.* In: Papers expert meeting taking stock, p. 31-62. DPRN, 2009. [http://www.iiav.nl/epublications//2009/Taking\\_stock.pdf](http://www.iiav.nl/epublications//2009/Taking_stock.pdf)

The input and outreach targets of ICCO, Hivos and Oxfam Novib are discussed in this paper.

## 11 GENDER CHECKLISTS

### What can you find here?

These checklist with respect to specific sectors give a quick insight in the most important gender issues with respect to the sector.

### How to use it?

Questions can be used for example to execute a gender analysis or a gender impact assessment.

### Different sectors

Gender Tipsheets OECD, 1998.

[http://www.oecd.org/document/34/0,3343,en\\_2649\\_34541\\_1896290\\_1\\_1\\_1\\_1,00.html](http://www.oecd.org/document/34/0,3343,en_2649_34541_1896290_1_1_1_1,00.html)

These tipsheets provide essential information on how and why gender equality is a crucial dimension in all development activities. They contain suggestions on possible obstacles and the tips on how to overcome them are also helpful.

The tipsheets enclose a whole range of sectors, including: gender mainstreaming; gender budgeting; organisational change; country and sectoral programming; participation; training; natural resource management; private sector development; (post)conflict situations; education; health; social insurance; housing; and, infrastructure.

### Agriculture and subsectors:

World Bank

*Gender in agriculture. A World Bank learning module.*

<http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTGENDER/0,,contentMDK:20192985~menuPK:489246~pagePK:148956~piPK:216618~theSitePK:336868,00.html>

This module has particular reference to the agriculture sector. It offers an overview of the issue of gender in development work, particularly agriculture; the approaches; the tools for implementing gender education and analysis across a variety of sectors and geographic regions including slide presentations, exercises for both trainers and audiences, sample terms of reference for contractors, and instruments to aid with gender analysis; case studies; and references

### Microfinance:

Mayoux, L.

*Sustainable micro-finance for women's empowerment. Strategy checklist.*

<http://www.genfinance.info/Documents/Gender%20Checklist.pdf>

### Natural resources management

IUCN - The World Conservation Union

*Factsheets.*

<http://www.genderandenvironment.org/publications.php?t=5>

Factsheets about all kind of subjects related to gender and the environment: agriculture, forestry, biodiversity, bioenergy, water, etc.

MFO's also developed specific tailor-made tools and manuals to integrate gender.

Examples from ICCO concern for instance gender and disaster management and conflict analysis; the link between gender equality, human rights and HIV/AIDS prevention; the connection between gender and value chain development; or a model for intervention for addressing gender-based violence in conflict areas.

## 12 HOW DO OTHER ORGANISATIONS DO IT?

Eerdewijk, A. van

*Energies and (dis)connections. The practice of gender mainstreaming in Dutch development cooperation.* In: Papers expert meeting taking stock, p. 31-62. DPRN, 2009. [http://www.iiav.nl/epublications//2009/Taking\\_stock.pdf](http://www.iiav.nl/epublications//2009/Taking_stock.pdf)

This paper investigates how gender mainstreaming is institutionalized within Dutch development organisations. It attempts on the one hand, to map actual practices of gender mainstreaming policies and, on the other hand, conceptually reflect on how successful gender is being mainstreamed.

When determining this success, the paper looks at the following key aspects of a definition of gender mainstreaming: the extent in which it touches all areas and levels of policy formulation and implementation; the extent in which gender concerns are an integral dimension and, whether the practice of gender mainstreaming is about contributing to gender equality.

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Moser, C.; Moser, A.

*Gender mainstreaming since Beijing. A review of success and limitations in international institutions.* Oxfam, 2005.

[http://www.oxfam.org.uk/what\\_we\\_do/resources/downloads/FOG\\_MGD\\_3.pdf](http://www.oxfam.org.uk/what_we_do/resources/downloads/FOG_MGD_3.pdf)

This article assesses progress made by international development institutions in gender mainstreaming since the Beijing Platform for Action in 1995. It categorises progress into three stages: Adopting the terminology of gender equality and mainstreaming; putting a gender mainstreaming policy into place; implementing gender mainstreaming in practice. It is at the level of implementation that significant challenges remain. Policy commitments to gender mainstreaming frequently evaporate in planning and implementation processes - due to lack of staff capacity, organisational culture and attitudes, and the "simplification" of the gender issue. The impacts of gender mainstreaming in terms of gender equality also remain largely unknown due to a lack of effective monitoring and evaluation of gender mainstreaming outcomes.

The article concludes that there is a pressing need to link strategies with concrete outcomes through the development of more robust and systematic monitoring and evaluation of the effects of gender mainstreaming on people's lives.

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Mukhopadhyay, M. , Steehouwer, G. , Wong, F.

*Politics of the Possible. Gender mainstreaming and organisational change. Experiences from the field.* Amsterdam: KIT Publishers,

[http://www.kit.nl/net/KIT\\_Publicaties\\_output/ShowFile2.aspx?e=916](http://www.kit.nl/net/KIT_Publicaties_output/ShowFile2.aspx?e=916)

What actually happens to organisations during gender and organisational change endeavours?

Politics of the Possible takes an in-depth look at the experience of seven Novib partner organisations in the Middle East and South Asia who undertook the challenge of the

Gender Focus Programme. It recounts their analysis of their organisations, and the routes they chose to follow. The book presents field experiences of managing the politically sensitive agenda of promoting gender equality in NGOs, and negotiating the contradictions between using Organisational Development tools and promoting gender equality.

Politics of the Possible shows how organisational change for gender equality is an integral part of gender mainstreaming processes. As a decade of evidence suggests, gender mainstreaming is vulnerable to becoming technocratic and ineffective. These seven organisations, unable to separate entirely the internal change process from their external work as NGOs, experienced a spill over of gender justice concerns into their work in the field, with a variety of programme results.

## Annex A: SEX-DISAGGREGATED DATA

When conducting a gender analysis, by monitoring and evaluation or by reporting it is important to distinguish between sex-disaggregated statistics or data (the straightforward numbers of males and females in a given population), and gender statistics or data (the underlying relationships between women and men).

A table to illustrate the distinction between sex-disaggregated statistics and gender data

<b>School with Total Enrolment of 100 Children</b>		
Girls	Boys	Implications ...
<b>Statistics disaggregated by sex</b>		
40	60	There are more boys than girls in the school
<b>Gender Data</b>		
10 of 40 are from poor households (25%)	35 of 60 are from poor households (55%)	Poor households make more effort to educate their sons.
Of the ten girls from poor households, 1 girl is from a Muslim family	Of the 35 boys from poor households, 22 are from Muslim families	Must be correlated with proportion of Muslim families in the population at large. Indicates that Muslim families place additional importance on boys' rather than girls' education. Special measures may need to be taken to educate parents about the value of girls' education and support girls' access to school.
Girls are absent from school when babies are born	Boys are absent from school in the dry season, to dig ditches	The dry season happens at the same time every year. Teachers can therefore plan the curriculum around those absences. Pregnancies and births are random, so girls are at a disadvantage, even if the total days absent are equivalent.
30% are malnourished	20% are malnourished	This tells us how girls are treated at home relative to boys. Nutritional level affect learning and retention. Boys and girls may both be able to attend school, but they cannot access the opportunity equally if girls are malnourished relative to boys.
Domestic work 4 hrs before and after school, including water, firewood, cooking, cleaning, sibling child care, selected	Domestic work 30 minutes after school, cattle	This has implications for homework. It has implications for discussion of entitlements, in relation to leisure time as a resource. Men's privilege is often embedded in their position, invisible to the men who experience it. Making this privilege visible is a characteristic outcome of gender specific data and its use in development decision-making.

agricultural tasks		
Parents not supportive of progress of girls on to high school (e.g. 38% of girl students' parents interviewed responded positively)	Parents are determined sons will go to high school (e.g. 77% of boy students' parents interviewed responded positively)	Without family support, social policy interventions or development project-specific inputs may not be long-term or yield lasting change. Work with parents is a possibility; so it work with village/community leaders. Multiple strategies are usually needed to make the necessary structural changes – building on the concept of social relations, the network of community relationships.

Source: UNDP. Developed by Trish Keays and Sarah Murison at a workshop on Gender Mainstreaming in Tokyo Japan. November 2000.