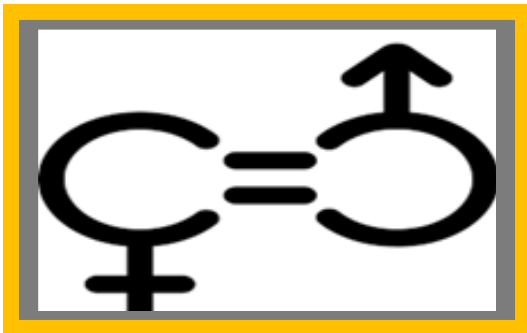


National Quality Infrastructure Development Project - NQIDP



Gender Mainstreaming Training Manual



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Gender Mainstreaming Training Manual

USERS' GUIDE INTRODUCTORY SESSION

- 🕒 Chapter 1: Gender Basics and Concepts**
- 🕒 Chapter 2: Gender Mainstreaming**
- 🕒 Chapter 3: Gender Analysis**
- 🕒 Chapter 4: Gender Audit**
- 🕒 Chapter 5: Gender-Responsive Budgeting**
- 🕒 Chapter 6: Gender Planning**
- 🕒 Chapter 7: Gender Responsive M&E**
- 🕒 Chapter 8: Gender Mainstreaming in PCM**

Acronyms

| | |
|----------------|--|
| BCC | Behavior Change Communication. |
| CEDAW | Convention on the Elimination of All Forms of Discrimination against Women |
| CVA | Capacity & Vulnerability Analysis. |
| ECAE | Ethiopian Conformity Assessment Enterprise |
| ELIA | Ethiopian Leather Industries Association |
| ENA | Ethiopian National Accreditation Office |
| ESA | Ethiopian Standards Agency |
| FDRE | Federal Democratic Republic Ethiopia |
| FFA | Force Field Analysis |
| FGD | Focus Group Discussion. |
| FHHs | Female Headed Households |
| FMHH | Female in Male Household Head |
| GA | Gender Analysis |
| GAD | Gender and Development |
| GAF | Gender Analysis Framework |
| GAM | Gender Analysis Matrix |
| GBD | Gender Based Development |
| GM | Gender Mainstreaming |
| GoE | Government of Ethiopia |
| GRAS | Gender Responsive Assessment Scale |
| HTP | Harmful Traditional Practices |
| IEC | Information Education Communication |
| ISO | International Standards Organization |
| LIDI | Leather Industry Development Institute |
| M&E | Monitoring and Evaluation |
| MDG | Millennium Development Goal |
| MoI | Ministry of Industry |
| MoTI | Ministry of Trade and Industry |
| NGO | Non-Governmental Organizations |
| NMIE | National Metrology Institute of Ethiopia |
| NQI | National Quality Infrastructure |
| NQIDP | National Quality Infrastructure Development Project |
| PCM | Project Cycle Management |
| PGN | Practical Gender Need |
| PIU | Project Implementation Unit |
| POP | People Oriented Planning |
| SGN | Strategic Gender Need |
| SRA | Social Relation Approach |
| SWOT | Strength Weakness & Opportunity Treat |
| ToT | Training of Trainers |
| UN | United Nation |
| WB | World Bank |
| WEEF | Women Empowerment & Equality Framework. |
| WID | Women in Development |

Glossary of Icons

| Icon | Meaning | Icon | Meaning |
|---|----------------------|--|------------------|
|  | Steps in the process |  | Brainstorming |
|  | Trainer's Tips |  | Trainer's Note |
|  | Lecture |  | Question |
|  | Think Pair Share |  | Group Discussion |
|  | Case Study |  | Case Story |
|  | Sharing Experience |  | Reflection |
|  | Role Play |  | Gallary walk |
|  | Way Forward |  | Reference |

USERS' GUIDE

Background and Overview of the Manual

Gender gap imposes significant costs on society, in terms of lost productivity, food security and economic growth. Promoting gender equality is not only upright for women or men but also for sustainable trade and regional integration improvement. The trade and regional integration sector is underperforming in many developing countries, partly because women do not have equal access to the resources and opportunities they need to be more productive. They operate in petty trade and engage in the industries as daily laborer which had a greater overall workload and less pay position. Women also have less access to education, trade information, technology, credit and other financial services. Evidence shows that women trader is largely excluded from credit arrangements because they lack fixed assets and other resources required to guarantee.

The power dynamics reflected around decisions related to business selection, technology identification and use, income expenditure and control, credit access have an implication on functionality, success and sustainability of trade. Moreover, level of development practitioners understanding on gender and attention given to respond to cultural norms, practices, and power inequalities exercised at all levels determines the extent gender dimension taken up at different steps in trade and industry intervention.

Understanding gender relations in the given sector or a given scenario is a fundamental issue to define socio-economic relations, power dynamics, cultural and political set-up between women and men. This will help to learn about the different conditions that affect or benefit both sexes and work out for balancing the situation. It is also important to understand the system of legal, political, economic and socio-cultural conditions that maintain and sustain the existing structure.

The institutional setup and commitment on systematizing gender issues also governs the scope that the issues can be taken as part and parcel of organizations mandate. In actual situation in many areas, trade professional's, planners, business advisors and decision-makers still inadequately perceives gender from trade and regional integration perspective. They are less familiar with the specific needs and priorities of women, and encounter difficulties in targeting them.

This training manual is developed with the help of National **Quality Infrastructure Development Project (NQIDP)**, which is implemented by the Government of Ethiopia with the support of the World Bank. The project is designed within the broader context to support the government in addressing the major constraints related to quality assurance services. NQIDP is envisioned as capacity development initiative; designed to support government organizations and private institutions to develop and manage gender responsive national quality infrastructure system and the gender responsiveness of trade and regional integration sector.

Purpose and objective of the Manual

This gender mainstreaming training manual has been conceived and developed to help trade and regional integration sector; especially women children and youth directorates, and other staffs and customers, to address gender related issues. The training manual aims to build-up the capacity of potential employees by equipping them with knowledge and skills on the following issues:

- Basic concepts of gender and related terminologies;
- Principles of gender mainstreaming and steps;
- Gender analysis framework and tools;
- Gender audit
- Gender budgeting
- Gender planning
- Gender responsive monitoring and evaluation and
- Gender in project cycle management

The manual is also designed to help share knowledge and skills among participants. Lessons focus on improving participants' knowledge, attitudes, skills, and habits (KASH). This will be facilitated through series of presentations and practical exercises enables participants to understand existing situation and help them acquainted with key concept and terms, gender analysis, gender budgeting, gender auditing and gender responsive planning approaches, tools , techniques and strategies.

Learning Outcome

By the end of this training, trainers will be able to:

- ☉ Understand and explain gender concept and terms properly;
- ☉ Describe the concept and purpose of gender mainstreaming and apply the principles of gender mainstreaming in trade and regional integration sector;
- ☉ Differentiate the common gender analysis frameworks, tools and techniques;
- ☉ Understand the concept and steps of gender budgeting and auditing;
- ☉ Promote engendered trade and NQIs planning, budgeting implementation, monitoring and evaluation.

How to Use the Manual

This is a standard training manual on gender issues including gender concepts, gender analysis, gender audit, gender budgeting, gender mainstreaming, and gender responsive monitoring and evaluation. It is not a one stop source of professional answers on gender issues. The trainer can choose/adapt topics, exercises and methodology according to the target group and the length of the training.

It is important to carry out a training needs assessment of trainer's background information to help identify training needs/gaps. The results will determine the training programs, methodology and how it may suit with the target group. The trainer may use all the chapters or some of them or only one chapter depending on what the target group requires and according to specific needs. Each chapters contains sessions with activities and tip for the trainer clarifying learning objectives and how to carry out the activities.

Target Audience

This training material will be used by public and private institutions that are directly or indirectly involved in trade and regional integrations. The manual will support trade and regional integration sector and key partner institutions efforts to respond on the problem of gender mainstreaming. It also used for any development actors who have an interest to empower women and ensure gender equality. The training material can be used to cascade and deliver during gender related training at different level.

Consideration of Target Audience

The trainer/facilitator should primarily determine the target group when designing the training program. In doing so, it is paramount to keep homogeneity of the target group in terms of understanding gender issues and awareness level. For example, it is not recommended that the trainer/facilitator convey a basic, intermediate, or advanced understanding of gender issues in particular training. The trainer/facilitator should consider sex, age and hierarchy (social and organizational).

Structure and Contents of the Manual

This manual starts with a list of suggestions on how to facilitate the opening of the training and the introduction of the trainees and the trainers, as well as the presentation of the purpose, objectives, contents and management of the training. All of these preliminary sections lead to the presentation of the eight training chapters.

The **first chapter** entitled, “*Gender Basics and Concepts*,” provides broad introduction on the basic concept of gender and gender related terminologies, gender equality and equity, gender based violence, level of gender awareness and the relationship between gender and development. This chapter is divided into four sessions. If all of the sessions will be taken up, the whole chapter is set to be completed in 10 hours.

The **second chapter** entitled “*Gender Mainstreaming*,” focuses on the conceptual frameworks of gender mainstreaming and gender integration with including the required tools, strategies and skills for effectively mainstream gender in the sector. The chapter has four sessions which are designed to be taken up in 3 hours.

The **third chapter** entitled, “*Gender Analysis*,” equips the trainees with adequate knowledge on the meaning, purpose, steps and the responsible body who undertake the gender analysis. It aims to provide detail explanation on a variety of gender analysis tools and techniques at different times in response to specific development questions and problems so as to conduct gender analysis through examining the necessary data and information on gender differences and social relations. The chapter is divided into four sessions. These four sessions are set to be taken up in 7 hours.

The **fourth chapter** entitled, “*Gender Audit*,” trains about the general ideas of gender audit in addition to develops the skills to undertake gender audits in order to promote gender equality in organizational and programmatic lines. Similarly, it support trainees to answer the basic questions like how can I easy-to-use means of resources in implementation and follow up of gender audits with providing a set of tools and practical guidelines to be used during the gender audit process. This chapter includes four sessions that will train in key gender audits conceptions. These four sessions are set to be taken up in 8 hours.

The **fifth chapter** entitled “*Gender-Responsive Budgeting*,” is designed to show what it means gender-responsive budgeting and how different factors can influence the budget cycle to promote gender-responsive budgeting with intended to help trainees developing tools and strategies to think through the actions to take at each steps of the sector or organization budget process. This chapter is divided into two sessions. These two sessions are set to be taken up in 2 hours.

The **sixth chapter** entitled, “*Gender Planning*,” aims to describe the concepts and elements of gender planning so as to address gender-based inequalities generally through an economically, socially and environmentally sustainable process which gained by a discussion of gender audit findings. The chapter has two sessions which are designed to be taken up in 2 hours.

The **seventh chapter** entitled, “*Gender Responsive Monitoring and Evaluation*,” seeks to equip trainees with the necessary knowledge and skills that will make them capable of understanding the basic concepts of gender responsive monitoring and evaluation after giving introduction about classical concepts of monitoring and evaluation. In addition to this, it requires the developments of an appropriate monitoring and evaluation frameworks and mechanisms for assessing progress, and thereby effectively participate in gender responsive monitoring and evaluation processes to attain impacts that are equitably beneficial for both men and women. This chapter includes three sessions that will train in key M&E outsets. These three sessions are set to be taken up in 4 hours.

The **final chapter** entitled, “*Gender Mainstreaming in Project Cycle Management - PCM,*” will be used to summarize the previous chapters. The chapter presents a practical guide to achieve gender mainstreaming using the project cycle as the entry point. It deals with integrating or mainstreaming gender concerns into the project cycle and providing tips in assessing and evaluating gender-sensitivity of programs/projects. The chapter also intends to help in identifying data needs for gender mainstreaming and the development of gender-sensitive indicators and steps in PCM. This chapter is divided into two sessions which are set to be taken up in 2 hours.

In summary, each the eight chapters; including chapter introduction, contents, learning objectives, duration, methodology, required material, activity with trainer’s tip and note.

Training Methodology

The training will be given in participatory ways which will allow the participant to spend sufficient time to share experience, discuss on the issue, and demonstrate their knowledge. A combination of multiple participatory training methods will be employed for the training. These include participatory short presentation and discussion (lecture), group exercise, individual assignment, case study and role play etc. The main training methodologies are describes as follows;

| Methods | Description |
|-------------------|---|
| Lecture | <ul style="list-style-type: none"> ▶ Lecture is useful for conveying new information and concepts to the learners and for providing context so that learners can relate what has been learnt to a conceptual framework. ▶ The lecture method is primarily used to build upon the learners’ existing base of knowledge. ▶ Lectures are also good for stimulating and motivating learners for further enquiry and for presenting a specialized body of external information. |
| Case Study | <ul style="list-style-type: none"> ▶ The group gets an opportunity to look at others’ experiences in case form. ▶ The learners reflect and analyze these experiences to derive new ideas. ▶ The learner’s own experiences, values, feelings form the basis for analysis of others’ experiences. ▶ It helps in creating new knowledge through analysis and synthesis. |

| | |
|-------------------------|---|
| Group Discussion | <ul style="list-style-type: none"> ➡ Discussion should play a major part in the presentation. ➡ This will pave the way for participants to share their life-experiences; the trainees will be familiar with learning, even though they may never have analyzed the process. ➡ Therefore, the major task of the trainer is to plan a sequence of questions that will lead the trainees to an identification of the elements and steps in the learning process and the factors that hamper learning. |
| Brainstorming | <ul style="list-style-type: none"> ➡ A process for generating creative ideas and solutions through intensive and freewheeling group discussion. ➡ Every participant is encouraged to think aloud and suggest as many ideas as possible. |
| Think Pair Share | <ul style="list-style-type: none"> ➡ The facilitator Pose question at that point, the participant think about independently and have someone to write individuals thought. ➡ In the next step participant “pair” with one another, and share their reflection. ➡ Then after, the pairs come together into large group for broader sharing the key point raised |
| Story Telling | <ul style="list-style-type: none"> ➡ Story telling is the interactive art of using words and actions to reveal the elements and images of a story while encouraging the listener’s imagination. ➡ Story telling involves a two-way interaction between a storyteller and one or more listeners. ➡ The responses of the listeners influence the telling of the story. |
| Role Play | <ul style="list-style-type: none"> ➡ Role play is to act out the scenario/to represent in action (another), especially in a make-believe situation in an effort to understand a differing point of view or social interaction. |
| Gallery Walk | <ul style="list-style-type: none"> ➡ Questions or sub topics are posted on the wall around the room. ➡ Subsequently, participant put in group or else separately writes down their ideas as they move from one station to another. |

Training Aids / Required Materials

- | | |
|-----------------------|-------------------------------|
| ✂ Handouts | ✂ Color slides |
| ✂ Computer | ✂ Videos |
| ✂ LCD projector | ✂ White board |
| ✂ Charts and diagrams | ✂ Markers and pens |
| ✂ Training Material | ✂ Masking tape |
| ✂ Flip chart | ✂ Note book |
| ✂ Sticker Note | ✂ Color and hard paper |
| ✂ Case Studies | ✂ Local martial for role play |

Training Evaluation

During the training, mood meter, mountain clamping, personal reflection on sticker note will be used on which participants could express their feelings about the training. At the end of the training the facilitator will distribute a temple that would help participants to measure the effectiveness of training, trainer and their own personal performance as trainees.

Report

Output of the training and fieldwork exercise will be properly recorded and documented. The report will be summarized and the facilitator will share comprehensive report that can be used to capture change overtime after the training.



INTRODUCTORY SESSION

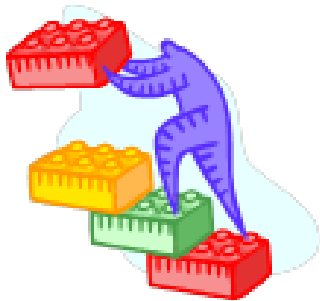
Getting To Know Each Other

The trainer/facilitator must help participants to build trust and develop a friendly and safe environment for the duration of the training. To do this, he/she must give participants the opportunity to get to know each other, share their expectations before the actual training sessions.

Objectives:

- To allow participants the opportunity to get to know each other,
- To break down initial interpersonal communication barriers, and
- To create a conducive, comfortable learning atmosphere.

Duration: One hour



Step 1: Divide participants into a group of two and make sure to team members who do not know each other before.

Step 2: Give the following questions for each group to interview their partner for 2 minutes.

- What is your name?
- Where do you work?
 - What do you expect to get from this training?
 - Do you have any fear about the training?
 - How do you plan to use the knowledge and skills you acquire from this training in your daily life and work?

Step 3: Give each group member an opportunity to introduce their partner to the larger group based on the discussion they had.

Step 4: Elaborate if the expectations and fears are realistic or unrealistic; and identify possible constraints and opportunities for the accomplishment of the training.

Step 5: Communicate the objective of the training to the participants.

Learning Contract/Ground Rules

At this point, it is important to develop learning contract or ground rules to make the training as smooth and disciplined as possible. Therefore, ask participants ‘what they should not do’ and/or ‘should do’ throughout the training. These could include time keeping, active participation, putting cell phones silent, respect for different opinions and others. To make things exciting add some ‘energizers/ice breakers” as a way punishment for any participant that breaches any of the ground rules breaching of the learning contracts. During the training, there will be a lot of group discussion. So beware not to put everyone in the same group every time you form the groups.



Duration of the Training: 38 hours

This training covers basic gender concepts, gender analysis, gender audit, gender budgeting, gender mainstreaming, and gender responsive monitoring and evaluation, gender mainstreaming in PCM topics. Thus, it is important to spend adequate amount of time on it and a minimum of 38 hours is essential for successfully completing the training and achieving the intended objectives.

Gender Mainstreaming Training Manual



Chapter 1

Gender Basics and Concepts

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Chapter Introduction

In this chapter, the basic concept of gender and gender related terminologies, Gender base violence, level of gender awareness and the relationship between gender and development will be discussed in detail. The activities are intended to give an insight on the issue under discussion. Besides, this will help participants to personalize the issue and relate to their existing fact and how things are happening in their community and organization they work.

Contents

The chapter comprises the following sessions:

Session One: Gender Concepts And Terminologies And Definitions

Session Two: Gender Base Violence

Session Three: Level of Gender Awareness

Session Four: Gender and Development

Objective

By the end of this unit Participants would be able to:

- ☞ Define basic concepts of gender and identify gender terminologies
- ☞ Deference gender equality and Equity
- ☞ Elucidate the meaning of patriarchy and patriarchal system
- ☞ Level of gender awareness
- ☞ Understand the relation between gender and development

Chapter Duration:

- 10 hours

Session One: - Gender Concepts and Terminologies

| Session One | Gender Concepts and Terminology |
|----------------------------|--|
| Duration | 180 minutes |
| Learning Objectives | <p>By the end of this session trainees will be able to:</p> <ul style="list-style-type: none"> ▪ Differentiate sex and gender ▪ Identify gender socialization agents ▪ Describe the conceptual meaning of gender related terminologies. ▪ Understand patriarchy and patriarchal system ▪ Elucidate affirmative actions |
| Content | <ul style="list-style-type: none"> ▪ Sex and gender ▪ Gender socialization ▪ Gender base division of labor ▪ Gender relation ▪ Gender stereotype ▪ Gender roles ▪ Gender needs ▪ Gender equity and equality ▪ Gender gaps and bias ▪ Patriarchy and patriarchal system ▪ Affirmative actions ▪ Women empowerment |
| Methodology | Presentation, Brainstorming, Reflection, Group Discussion and Group Work |
| Required Materials | Flip char, Computer, LCD projector, Marker, Pens, Stick notes, Plaster, Handout and Flash card |



Activity 1: Brainstorming on Sex and Gender

Duration for the activity: 15 minutes

Step 1: The trainer will ask trainees to share and discuss about the following questions;

- What do you think sex?
- What do you think Gender?
- Are gender and sex different or the same?

Step 2: Put key concepts of their reflection on flip chart then combine and refine what is forwarded by the participant.

Step 3: Summarize the participants reflection based on trainer's note.

Trainer's Note

1. Gender Concepts and Terminologies

1.1. Sex and Gender

What do we mean by "sex" and "gender"?

Sometimes it is hard to understand exactly what is meant by the term "gender" and how it differs from the closely related term "sex".

- **"Sex"** refers to the biological and physiological characteristics that define men and women.
- **"Gender"** refers to the socially constructed roles, behaviors, activities, and attributes that a given society considers appropriate for men and women.

The Difference between Gender and Sex

| Sex | Gender |
|--|---|
| <ul style="list-style-type: none">➤ Fact of human biology➤ What we born with➤ Being born as men or female➤ Universal➤ Permanent (if not changed through Surgery)➤ Naturally given➤ Agent is nature | <ul style="list-style-type: none">➤ The result of social construction➤ Everything that happen after birth➤ Gender is about the relations' between men and female➤ Differ from culture to culture and over time➤ Change over time due to social, economic or political change➤ Learned (result of socialization)➤ Agents are parents, teachers, peers, culture and tradition |



Activity 2: Matching Group Work

Purpose of the activity: To allow participants to become aware of common gender concepts and terminologies.

Duration of the activity: 30 Minutes

Step 1: Prepare flash card each contains basic gender words and terminologies and prepare another flash card that have the meaning of each words and terminologies:

Step 2: Divide participants into small groups

Step 3: Distribute the flash card for participants. Make each group discussed and decided which words or terminologies on the flash card match with the meaning written on the flip chart.

Step 4: Have each group present their matching definition for the larger group.

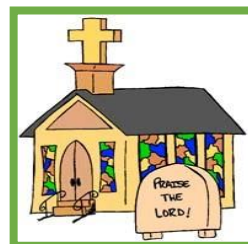
Step 5: Give feedback for each presentation.

Step 6: Summarize all the presentation based on trainer's note.

Trainer's Note

1.2. Gender Socialization

Socialization is the process through which a child becomes an individual respecting her or his environment laws, norms, values and customs. Gender socialization refers to how children of different sexes are socialized into their gender roles and taught what it means to be male or female. Gender socialization is how people learn to conform to social roles of being male/female; gender appropriate or gender inappropriate behavior. The process of gender construction is life-long and carried out through units and processes such as the family, school, religion, media, work place, language and folklore.



1.3. Gender Relations

Gender relations are hierarchical relations of power between women and men that tend to disadvantage women. These gender hierarchies are often accepted as 'natural' but are socially determined relations, culturally based, and are subject to change over time. They can be seen in a range of gendered practices, such as the division of labor and resources, and gendered ideologies, such as ideas of acceptable behavior for women and men. Gender relations are concerned with how power is distributed between the sexes. Gender relation arises from the role men and women are expected to play in the society.

1.4. Gender Stereotypes

Stereotypes are generalizations of the characteristics, beliefs, habits and/or behaviours of a group of individuals based on some part of their identity, such as gender, race, class, age, sexual orientation, disability, or occupation. Stereotypes are preconceived and relatively fixed ideas about a person, group, or social group. Gender stereotypes are fixed, unquestioned beliefs or images we carry in the back of our minds about women and men transmitted from generation to generation through the socialization process. Gender stereotyping involves expectations about how people should behave based upon their gender. The process of gender socialization and stereotyping continues through childhood, adolescence and adulthood. Abolishing gender stereotypes may give people the freedom to develop more realistic expectations and to live the way they choose.

| Female stereotypes include being:- | Male stereotypes include being:- |
|---|---|
| Nurturing, supportive, intuitive, emotional, need- full, dependent, tender, timid, fragile, childlike, passive, obedient, Submissive, etc.” | Powerful, creative, intelligent, rational, independent, self-reliant, strong, courageous, daring, responsible, forceful, authoritative, successful, etc.” |

1.5. Gender Base Division of Labour and Gender Roles

Gender Base Division of Labour

Refers to the allocation of different tasks, roles, responsibilities and activities assigned to women and men according to what is considered socially and culturally appropriate. It shows how tasks and roles are divided between women and men in households, community and society. It also allows us to appreciate time spent on various roles by both women and men and what time is available for leisure activities. As an entry point to understand gender as a social construct a question often asked is ‘who does what work?’

Gender Roles

It refers to determined patterns of behavior in terms of rights, duties, obligations and responsibilities assigned to females and males in a given society. It differs from one society to another, from place to place and over time. In gender-based division of work, women have triple roles, these are:-

- ***Reproductive Role:*** Child-bearing/rearing responsibilities and domestic tasks done by women; required to guarantee the maintenance and reproduction of the labor force.
- ***Productive Role:*** Work done by both women and men for pay in cash or kind.
- ***Community Managing Role:*** Community activities including: ceremonies and celebrations, local politics and community services. Although both men and women participate in community work, men's community work is often valued more and men are sometimes paid. Activities undertaken primarily by women at the community level are extensions of their reproductive role. Women ensure the provision and maintenance of scarce resources for collective consumption, such as water, health care and education. This is voluntary unpaid work, and is undertaken during 'free' time.

1.6. Gender Needs

Gender needs are shared and prioritized needs identified by women and men that arise from their common experiences as a gender. These interests vary in each context and are related to roles and expectations, as well as to gender divisions of labour, resources and power.

I. Practical Gender Needs:

These are needs that women and men can easily identify. They refer to immediate needs related to inadequate living conditions. Practical needs can be defined as immediate necessities: water, shelter, food, income and health care. They do not challenge the structure. In itself it will not change the prevailing disadvantaged (subordinate) position of women.

II. Strategic Gender Needs:

These are gender needs about exercising more choices, more options or more voices. They focus on fundamental issues related to women's (less often men's) subordination and gender inequities. It refers to long-term need for structural changes such as legislation for equal rights and challenges to the system.

- Strategic interests refer to the relative status of women and men within society.
- Strategic interests may include gaining legal rights, closing wage gaps, and protection from domestic violence, increased decision making, and women's control over their bodies.

To ensure sustainable benefits, both practical needs and strategic interests must be taken into account in the design of policies, programs and projects.

Practical needs vs. Strategic needs

| Practical needs | Strategic needs |
|---|---|
| <ul style="list-style-type: none">➤ Tend to be immediate, short term➤ Specific to certain women: food, housing, income, children's health, etc.➤ Easily identifiable by women and men /precise elements: food, hand pumps, clinics | <ul style="list-style-type: none">➤ Tend to be long term and Common for all women.➤ Are related to a subordinate position: lack of resources and of education and training, vulnerability to poverty to poverty and violence, etc.➤ The foundation that explains the subordination as well as the potential for change is not always easily identifiable by women➤ Can be satisfied by confidence building, improved self-confidence political mobilization, strengthen of women's organizations, etc. |
| <i>The satisfaction of practical needs</i> <ul style="list-style-type: none">➤ Tend to make the women beneficiaries and sometimes participants➤ Can improve women's living conditions➤ Generally, does not change the traditional roles and social relations | <i>The satisfaction of strategic needs</i> <ul style="list-style-type: none">➤ Tend to make the women agent of change or empower them to become agents.➤ Can improve situation the women have in the society➤ Can give more power to women and transform the social relations |

1.7. Gender Gaps

Gender Balance

It refers to the equal and active participation of women and men in all areas of decision-making, and in access to and control over resources and services.

Gender Disparity

It refers to the degree of gender gap in status, political visibility, in access and control over resources, in access and control over benefits, in participation in development process, in access and control over social services, and political decision making between men and women, and boys and girls.

Gender Gaps

Gender Gap is a measure of gender inequality. It is a useful social development indicator. For example, one can measure the gender gap between boys and girls in terms of health outcomes, as well as educational levels achieved and labor income.

Gender Bias

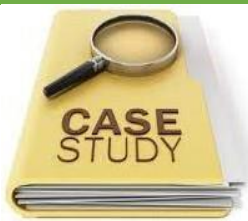
Gender bias is the tendency to make decisions or take actions based on preconceived notions of capability according to gender.

Patriarchy and Patriarchal System

Literally, patriarchy means rule by the male head of a social unit (a family or tribe). Patriarchy refers to systemic societal structures that institutionalize male physical, social and economic power over women. It is also a power relation by whom men dominate and subordinates women in both the private and public spheres. This subordination begins very early within the family which dictates the do's and of girls and boys; these continue to be reinforced by all forms of institutions/systems, be it the school, peer group, community, caste groups, the judicial system or religious orders. The subordinate status of girls/women is internalized by both sexes through the process of socialization. Patriarchal system generally manifested in: socio culturally, politically and economically.

1.8. Affirmative Action

Affirmative action is an action or a policy designed to redress past discrimination against women and minority groups through measures to improve their economic and educational opportunities. To foster diversity and compensate for the ways such groups have historically been excluded, institutions with affirmative action programs prioritize the inclusion of minority groups in the employment, education and government sectors, among others. For example, affirmative action programs have allowed women and minorities entry into professions formerly off limits to them.



Activity 3: Case Story on Gender Equality and Equity

Duration for the activity: 15 minutes

Step 1: Divide in to small groups in the way that it ensures gender balance.

Step 2: Ask trainees to share and discuss on the following short case story pictures of the Fox and the Crane?

- What is the relation of the story with gender equality and gender equity?

The Fox invited the Crane to lunch. He served the food on a large flat dish. The Crane with her long, narrow beak could not eat.

Another day, the Crane invited the Fox to dinner. She served the food in a deep vase. The Fox with his short and wide face could not eat.



Step 3: Let trainees in group to discuss and reflect their point of view each other.

Step 4: Put key concepts of their reflection on flip chart then combine and refine what is forwarded by the participant.

Step 4: Summarize the discussion using trainer's tips and note.

Helpful Tips

Trainer's Tips



- Both friends had an equal opportunity for nourishment, but each time one of them could not take advantage of this opportunity.
- Equality of opportunity only does not bring equality of outcome.

Inequality

Unequal access to opportunities

1

With privileges to the stronger and disempowered

With privilege to the weaker and disempowered

Equality?

Evenly distributed tools and assistance

2

With privileges to the stronger and disempowered

With privilege to the weaker and disempowered

Equity

Custom tools that identify and address inequality

3

With privileges to the stronger and disempowered

With privilege to the weaker and disempowered

Justice

Fixing the system to offer equal access to both tools and opportunities

4

With privileges to the stronger and disempowered

With privilege to the weaker and disempowered

Trainer's Note

1.9. Gender Equity and Equality

Gender Equity: is the process of being fair to women and men. To ensure fairness, measures must be taken to compensate for historical and social disadvantages that prevent women and men from operating on a level playing field. This refers to fairness to both sexes in the assignment of duties, responsibilities, leadership roles, etc., in making opportunities available and rewarding individuals for equal work.

Gender Equality: refers to equal rights, voice, responsibilities and opportunities for men and women in societies, at work and in the home and absence of discrimination on the basis of a person's sex, to opportunities, the allocation of resources and benefits and access to services. The different behaviors, aspirations and needs of women and men are equally valued and favored and should not give rise to different consequences that would reinforce inequalities. The concept is based on the premise that women and men should be treated in the same way mainly due to the fact that all human beings (male or female) are entitled to equal rights and obligations.

1.10. Women Empowerment

Empowerment is process through which women, men; girls and boys in disadvantage position increase their access to acquire knowledge, skills, economic assets, information, technology, decision making power and its services and social support as well as its awareness of participation in their communities in order to reach a level of control over their own environment. Empowerment encompasses self-sufficiency and self-confidence and is inherently linked to knowledge and voice. (It's achieving control over one's life through expanded choices); and it is a function of individual initiative, which is facilitated by institutional change and support.

Therefore, **Women Empowerment** is a process that leads to greater participation of women in social and gender imposed problems to ensure their power ownership. It is a process where greater decision, power and control lead to conscious action for social transformation. The process of empowerment is not sectorial; it encompasses women's multiple roles and interests, and addresses the interrelationship between them, leading to women gaining greater control over their own lives.

Session Two: - Gender Based Violence - GBV

| | |
|----------------------------|---|
| Session Two | Gender Based Violence - GBV |
| Duration | 60 minutes |
| Learning Objectives | <p>After the end of this session, participants will be able to:</p> <ul style="list-style-type: none"> ▪ Understand the meaning of Gender Base Violence ▪ Differentiate forms of Gender Base Violence |
| Content | <ul style="list-style-type: none"> ▪ Definition of Gender Base Violence ▪ Forms of Gender Base Violence |
| Methodology | Presentation, Brainstorming, Reflection, Discussion, Group exercise and Role Plays, |
| Required Materials | Flip chart, Computer, LCD projector, Marker, Pens, Stick notes, Plaster, Handout |



Activity 4: Role Play on

Duration of the activity: 60 Minutes

Step 1: Divide participants in to small groups with gender balance.

Step 2: Divide participants in to small groups,

Step 3: Ask participants to write a short script on GBV and simulate based on the script.

Step 4: Have each group present their short play for the larger group.

Step 5: Give feedback for each play.

Step 6: Summarize all the presentation based on trainer's note.

Trainer's Note

2. Gender Base Violence (GBV)

2.1. Definition of Gender Base Violence

Gender Base Violence - GBV is violence directed against a person because of that person's gender or violence that affects persons of a particular gender disproportionately.

Violence against women is understood as a violation of human rights and a form of discrimination against women and shall mean all acts of gender-based violence that result in, or are likely to result in: Physical harm, Sexual harm, Psychological, Economic harm and Suffering to women.

It can include violence against women, domestic violence against women, men or children living in the same domestic unit. Although women and girls are the main victims of GBV, it also causes severe harm to families and communities.

2.2. Forms of Gender Base violence

GBV can take various forms:

- **Physical:** it results in injuries, distress and health problems. Typical forms of physical violence are beating, strangling, pushing, and the use of weapons.
- **Sexual:** it includes sexual acts, attempts to obtain a sexual act, acts to traffic, or acts otherwise directed against a person's sexuality without the person's consent.
- **Psychological:** includes psychologically abusive behaviors, such as controlling, coercion, economic violence and blackmail.

Examples of gender base violence

- **Domestic violence** includes all acts of physical, sexual, psychological and economic violence that occur within the family, domestic unit, or between intimate partners.
- **Sex-based harassment** includes unwelcome verbal, physical or other non-verbal conduct of a sexual nature with the purpose of violating the dignity of a person.

Session Three: - Level of Gender Awareness

| Session Three | Level of Gender Awareness |
|----------------------------|--|
| Duration | 60 minutes |
| Learning Objectives | <p>After the end of this session, participants will be able to:</p> <ul style="list-style-type: none"> ▪ Explain the difference level of gender awareness ▪ Describe the characteristics of a gender blind, aware, sensitive, transformative and responsive individual and institution |
| Content | <ul style="list-style-type: none"> ▪ Gender Blind ▪ Gender Aware ▪ Gender Sensitive ▪ Gender Responsive ▪ Gender Transformative ▪ Characteristics of each GRAS level |
| Methodology | Presentation, Brainstorming, Discussion, Group exercise |
| Required Materials | Flip chart and flipchart stand, Computer, LCD projector, Marker, Pens, Stick notes, Plaster, Handout, flash card |



Activity 2: Group Work on Level Of Gender Awareness

Duration of the activity: 15 Minutes

Step 1: Divide participant in to 5 small groups in the way that it ensures gender balance.

Step 2: Write and distribute one level of gender awareness note for each groups.

Step 3: Ask participant to discuss on the note they have.

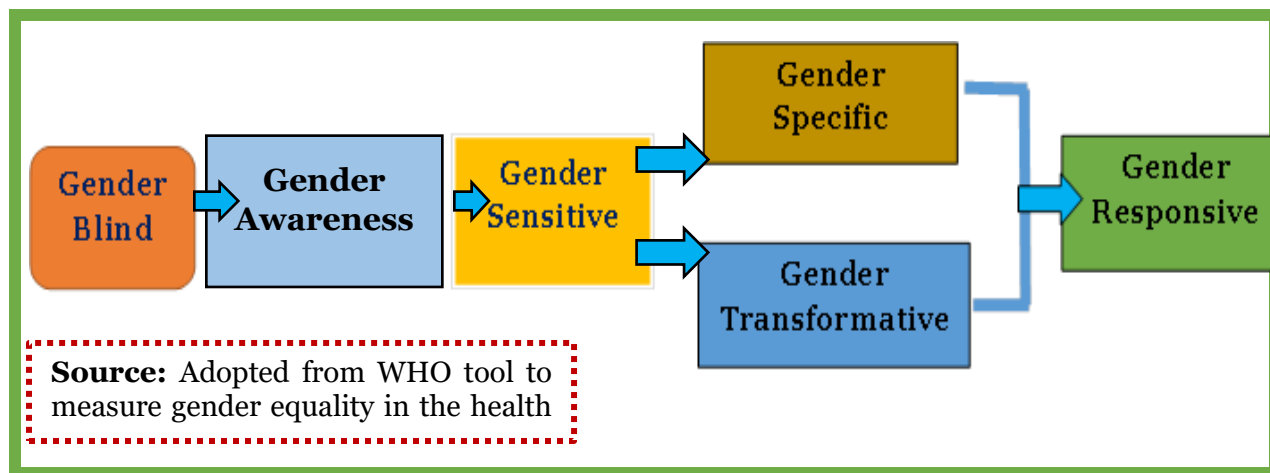
Step 4: Let each group present their understanding for the larger group.

Step 5: Review and summarize the presentation as per the trainer's note.

Trainer's Note

3. Level of Gender Awareness

The five levels of Gender Responsiveness Assessment Scale (GRAS)



3.1. Gender Blind

Gender blindness is the failure to recognize that gender is an essential determinate of social outcome impacting on projects and policies. This is a person/organization who/which does not recognize that gender as a determinant of the life choices available to us in a society. A gender blind approach assumes gender is not an influencing factor in a project, program and policy.

3.2. Gender Awareness

It is an understanding that there are socially determined differences between women and men based on a learned behavior. It is a perspective, a set of insights which informs our understanding of equitable distribution of resources and the gender equal social relation. It refers to the knowledge and appreciation of the social and cultural difference between women and men, and how this result in difference of roles, power, relation, privileges, responsibilities, needs, and access to and control over resources and benefits. These affect their ability to access and control resources.

3.3. Gender Sensitivity

This is the ability and willingness to perceive existing gender differences, issues and equalities, gap and incorporate these into programs, strategies and actions. It is the ability to recognize both men's and women's different perception, interest and expectations arising from their different social and economic roles.

3.4. Gender Responsiveness

This is planning and implementing activities that meet identified gender issues/concerns that promote gender equality. We need to consider gender responsiveness in strategies, budgets, skill trainings, planning etc. Gender responsiveness is defined as creating an environment that reflects an understanding of the realities of women's lives and addresses the issues of the participants. It is designed to ensure equality of treatment within the existing system.

3.5. Gender Transformative

Gender transformative approaches (GTA) are programs and interventions that create opportunities for individuals or institutions to actively challenge gender norms, promote positions of social and political influence for women in communities, and address power inequities between persons of different genders.

It is strategies that address the causes of gender-based inequalities and works to transform harmful gender roles, norms and power relations by:

- Fostering critical examination of inequalities and gender roles, norms and dynamics,
- Recognizing and strengthening positive norms that support equality and an enabling environment
- Highlighting the position of women and girls relative to men and boys while taking into account the added effects of marginalization.

3.6. Characteristics of each GRAS level

| Level | Characteristics of each GRAS level |
|---|---|
| Level 1: Gender-blind | <ul style="list-style-type: none"> ➤ Ignores gender norms, roles and relations ➤ Reinforces gender-based discrimination ➤ Ignores differences in needs, priority, opportunities for women and men ➤ Allows the socially privileged parity to enjoy more rights or opportunities than the other ➤ Often constructed based on the principle of being “fair” by treating everyone the same |
| Level 2: Gender-awareness | <ul style="list-style-type: none"> ➤ Understand gender norms, roles and relations ➤ Does not address inequality generated by unequal norms, roles or relations |
| Level 3: Gender-sensitive | <ul style="list-style-type: none"> ➤ Considers gender norms, roles and relations ➤ Does not address inequality generated by unequal norms, roles or relations ➤ Indicates gender awareness, although often no remedial action is developed |
| Level 4: Gender-specific | <ul style="list-style-type: none"> ➤ Considers implication of gender norms, roles and relations on women and men access to and control over resources, services, decision making power ➤ Considers women’s and men’s specific needs ➤ Intentionally targets and benefits a specific group of women or men to achieve certain needs /project objective ➤ Makes easier for women and men to fulfil duties that are ascribed to them based on their gender roles |
| Level 5: Gender-transformative | <ul style="list-style-type: none"> ➤ Considers gender norms, roles and relations for women and men. ➤ Considers women’s and men’s specific needs ➤ Includes ways to transform discriminatory gender norms, roles and relations ➤ Addresses the underlining and root causes of gender-based inequities. |

Session Four: - Gender and Development

| | |
|----------------------------|---|
| Session Four | Gender and Development |
| Duration | 60 minutes |
| Learning Objectives | <p>After the end of this session, participants will be able to:</p> <ul style="list-style-type: none"> ▪ Recite the historical background of gender and development ▪ Describe gender in the context of Development ▪ State the WAD and WID approach |
| Content | <ul style="list-style-type: none"> ▪ What is Development? ▪ Why Gender is a Development Issue? ▪ Historical background of Gender and Development ▪ Women in Development (WID) ▪ Gender and Development (GAD) ▪ Difference between WID and GAD |
| Methodology | Presentation, Brainstorming, Reflection, Discussion, Group Exercise |
| Required Materials | Flip chart and flipchart stand, Computer, LCD projector, Marker, Pens, Stick Notes, Plaster, Handout |



Activity 6: Question and Reflection



Step 1: Pose the following questions for participants to discuss on plenary:

- What does development means?
- Why gender a development issue?

Step 2: Write down key responses of the participants on flip chart.

Step 3: Summarize the key points arising from the discussion by using trainer's note.

Trainer's Note

4. Gender and Development

4.1. What is Development?

Development is an all-embracing progressive change which improves the social, economic and politically a country by enhancing and promoting the educational, health, employment, social and political status of its people “the ultimate objective of development must be to bring about a sustained improvement in the well-being of the individual and bestow benefit of all”.

The standard definition of sustainable development is the ability to make development sustainable to ensure that it meets the needs of the present without compromising the ability of future generations to meet their own needs. The use of this definition has led many to see sustainable development as having a major focus on intergenerational equity. The role of women in bringing sustainable development has been down played. Thus, many thinkers have come to a conclusion that gender is a development issue.

4.2. Why Gender is a Development Issue?

There are a number of reasons for gender to be a development issue; some of all are;

- Each sex constitute half of the population, ignoring half of the population in development does not bring full, effective and efficient development at all;
- Men and women are prime agents of development, each must be recognized, addressed and mobilized;
- Both men and women must share the fruit of development equitably;
- Addressing the gender questions means partly addressing the culture constraints and re-defined development to cater for two sexes.
- Sustainability of development efforts can be achieved if both men and women's participation should be ensured.
- 70% of the world's poor are women therefore investing in women leads to economic growth, improved family welfare, a reduction in poverty and more equitable distribution of the socio-economic benefits of development.
- Women form 50% of the world's population, Women perform 2/3 of the world's work.

4.3. Historical Background of Gender and Development

A major impetus for women in development (WID) had resulted from the 1975 Mexico City UN women's conference. This Conference with the theme of Equality, Development and Peace articulated the equality of women in any development process which recognized Practical gender needs and the participation of women in the development to functional economy as one of the basic mean so increasing efficiency in production.

4.5. Women in Development (WID)

The WID approach assumes that women are socially, economically and politically at a disadvantage; and aims to promote women by offering targeted assistances to help them attain equal rights and equal status, through "women's empowerment". WID employs strategies of integration targeted at providing skills training and education for women so that they can more effectively participate in the development, opening up opportunities for women to enter the market economy; and placing women in decision making position in order to advocate for policies on the advancement of women.

The WID approach arose from the realization that women's contributions were being ignored and that leads to many failures in development. Thus it focuses on the improvement of women's livelihoods through addressing the practical gender needs of immediate and material circumstance, through income, improvement and skill enhancement. But experiences have shown that by means of a strategy of women promotion alone, equal rights for both genders can never be attained, as it is possible to alter the disparity of power between women and men. While women's role in economic development did not occur in a vacuum, yet WID failed to account for the existing power structures codified in the sexual division of labour.

4.6. Gender and Development (GAD)

The GAD approach was developed in 1980s, with the objective of removing disparities in social, economic and political quality between women and men as a precondition for achieving people-centered development. The gender and development approach emerges as an action to failure of women-only program under the WID methodology that promotes separate development activities for women, and as such was seen as too piecemeal and tended to tackle the symptom rather than the root of the problem.

GAD seeks to address strategic gender needs and understand women's subordination through analysis of gender relation within the framework of important and relevant factors like social class, race, age, etc. This involves enhancing gender equality, by placing the issue of particular concern on the main agendas of those institutions which shape their relation. It rather promotes efficiency, as well as identifying opportunities for improving gender distribution and equity in development policies/programs/projects. The attempt here is to integrate gender awareness and competency into “mainstreaming” development projects, through policies of “gender equality” concept, focusing on provision of equal opportunities and equal power for both women and men.

GAD includes three main Concepts:

i. Both men and women create and maintain society and shape the division of labor. However, they benefit and suffer unequally. Therefore, greater focus must be placed on women because they have been more disadvantaged.

ii. Women and men are socialized differently and often function in different spheres of the community, although there is interdependence.

As a result, they have different priority and perspective. Because of gender roles, men can constrain or expand women's option.

iii. Development affects men and women differently, and women and men will have different impacts on projects.

Both must be involved in identifying problems and solutions if the interests of the community as a whole are to be furthered.



Trainer's Tips

Both **WID** and **GAD** can contribute to women's advancement and increase gender equity. WID projects enable women to address their practical needs and gain experience for projects in which they are mainstreamed. GAD enables women to address strategic interest, and women and men to work together towards mutual goals and greater equality. As such, both deserve due consideration by development planners.

4.7. The Difference between WID and GAD

| Compression | WID | GAD |
|--------------------|---|---|
| Focus | ➡ Women. | ➡ Gender (Women and Men). |
| Perspective | ➡ Women's lack participation as the problems. | ➡ Gender (women and men) center development. |
| Method | ➡ Disregard women from the development process. | ➡ Gender equality and equity in the development process. |
| Goal | ➡ Current and groundless women development. | ➡ Equitable and sustainable gender development. |
| Solution | ➡ Integrate women in to the existing structure only. | ➡ Empower and transform gender in to the overall structure. |
| Strategy | <ul style="list-style-type: none"> ➡ Women's only projects, ➡ Women only components, ➡ Increasing women's income in order to manage the household. | <ul style="list-style-type: none"> ➡ Identify gender practical needs, ➡ Address gender strategic needs, ➡ Achieving viable socio-economic improvement for household. |
| Action | ➡ Target women to engage in IGA, ICS, animal fattening, training in food preparation, etc. projects. | ➡ Train and coach women to engage in traditionally male dominated activities/projects. |
| Role | ➡ Women as beneficiaries in the development. | ➡ Women as actress for their own development. |

Gender Mainstreaming Training Manual



Chapter 2



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Chapter Introduction

The concept of gender mainstreaming was introduced during the UN 3rd World Conference on Women in Nairobi, 1985 then after further developed at the UN 4th World Conference on Women in Beijing, 1995 (Beijing Platform for Action). It has been adopted globally as a strategy to ensure that gender equality is one of the outcomes of all development interventions in social, economic and political spheres.

Gender mainstreaming in different sectors of institutions is the process of assessing the implications for girls, boys, women and men of all planned actions, including legislation, policies or programs, at all levels of the operating system. Gender mainstreaming should be conducted in all sectors of institutions, whether private or public, as well as in government and international organizations. Thus, this chapter gives an overview of the concept tools and strategies of Gender Mainstreaming and Gender Integration.

Contents

The chapter comprises the following sessions;

- Session One: Concepts of Gender Mainstreaming
- Session Two: Levels of Gender Mainstreaming
- Session Three: Gender Mainstreaming Tools and Techniques
- Session Four: Prerequisites and Challenges for Gender Mainstreaming

Objectives

At the end of this chapter the participants will be able to:

- 🌀 Understand the Concept of Gender Mainstreaming,
- 🌀 Differentiate Levels of Gender Mainstreaming,
- 🌀 Describe Gender Mainstreaming Tools and Techniques, and
- 🌀 Identify Prerequisites and Challenges for Mainstreaming Gender.

Chapter Duration

- 3 Hours

Methodology

- Lecture
- Questions
- Reflection
- Brainstorming
- Group Discussions
- Case story

Required Material

- LCD Projector
- Laptop Computer
- Flip Chart
- Markers
- Pens
- Note Book
- Colour Paper
- Handout
- Masking Tape
- Sticker Note
- Hard paper
- Case study

Session One: - Concepts of Gender Mainstreaming

| | |
|----------------------------|--|
| Session One | Concepts of Gender Mainstreaming |
| Duration | 30 minutes |
| Learning Objectives | <p>By the end of this session trainees will be able to:</p> <ul style="list-style-type: none"> ▪ Define Gender Mainstreaming, ▪ Explain the importance of Gender Mainstreaming, and ▪ Analyze the difference between Gender Mainstreaming and Gender Integration. |
| Content | <ul style="list-style-type: none"> ▪ Definition of Gender Mainstreaming ▪ Importance of Gender Mainstreaming |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 1: Brainstorming on Gender Mainstreaming and Gender Integration

Purpose of the activity: to stimulate trainees thinking on critical experience knowledge and incidences that shaped their attitude and perception towards Gender Mainstreaming and Gender Integration.

Duration for the activity: 15 minutes

Step 1: Divide in to small groups in the way that it ensures gender balance.

Step 2: Printout and distribute the question item worksheet to the group members.

Step 3: Ask trainees about the meaning of Gender Mainstreaming and difference between Gender Mainstreaming and Gender Integration.

Step 4: Let trainees in group to discuss and reflect their point of view each other.

Step 5: Summarize the discussion using trainer's tips and note.



Trainer's Tips

Gender Mainstreaming Vs Gender Integration

| Gender Mainstreaming | Gender Integration |
|--|---|
| <ul style="list-style-type: none"> ➡ Going beyond number and bringing change on the perception, experience and practice | <ul style="list-style-type: none"> ➡ Usually focus on women's involvement into a development already decided upon by others. |
| <ul style="list-style-type: none"> ➡ Promotes process of interweaving gender equality elements into the development agendas, process, strategies etc. at all steps & levels | <ul style="list-style-type: none"> ➡ Does not make basic changes in the characteristics |
| <ul style="list-style-type: none"> ➡ Demand inquiries on types of projects to benefit both women and men | <ul style="list-style-type: none"> ➡ Focus on numeric representation of men and women without considering their differential need and interest |
| <ul style="list-style-type: none"> ➡ Bringing the experiences, knowledge, and interests of women and men in development agenda | <ul style="list-style-type: none"> ➡ Putting gender as an added on to the program- without analysis and identification of gender concerns & its implications |

Trainer's Note

1. Concepts of Gender Mainstreaming

1.1. Definition of Gender Mainstreaming

Gender Mainstreaming is the process of assessing the implication for women and men of any planned action, including legislation, policies or programs, in all areas and at all level. It is a strategy for making women's as well as men's concern and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programs in all political, economic and social spheres.

It is the process of integrating a gender equality perspective into the development process at all stages and levels. Gender mainstreaming is also a strategy for integrating gender concerns and making gender equality as central issues at all activities of policy development, research, advocacy, dialogue, legislation, resource allocation, and formulation, planning, implementation and monitoring of programs and projects.

It is an ever ending process, rather than a goal of ‘doing Gender’ once and for all, because gender roles and relations continuously change. The Gender mainstreaming definition has two components: *programmatic (operational)* and *institutional gender mainstreaming*.

- ***Programmatic (operational) gender mainstreaming:*** applies gender analysis methods to better understand how gender norms, roles and relations affect women and men benefiting from a program/project.
- ***Institutional gender mainstreaming:*** applies gender audit to examines how organizations function [policy development, agenda-setting, administrative functions and overall system-related issues, organizational procedures and mechanisms such as staffing, recruitment and staff benefits policies (e.g. establishing work-life balance, gender balance in staffing, equal opportunities for upward mobility, and mechanisms for equal participation of male/female staff in decision-making procedures)]

1.2. Importance of Gender Mainstreaming

The ultimate goal is to achieve gender equality so that women and men benefit equally and inequality is not perpetuated. Specifically;

- Equal career opportunities for women and men
- Fair distribution of unpaid and paid work among women and men, wages and salaries that women and men can live on independently
- Equality of women and men with regard to representation and participation
- Enhancement of gender roles and elimination of restricting gender standards
- Same personal freedoms for women and men, protection against all forms of violence

Generally, it aims to strengthen the legitimacy of gender equality values by addressing gender disparity and gaps which have been highlighted in the division of labor, access and control over resources, access to services, information and opportunities and distribution of power and decision making.

Session Two: - Levels of Gender Mainstreaming

| | |
|----------------------------|---|
| Session Two | Levels of Gender Mainstreaming |
| Duration | 30 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none">▪ Describe and relate levels of gender mainstreaming |
| Content | <ul style="list-style-type: none">▪ Macro level▪ Meso level▪ Micro level |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 2: Group Discussion on Gender Mainstreaming Levels

Duration for the activity: 15 minutes

Step 1: Divide in to small groups in the way that it ensures gender balance.

Step 2: Ask trainees about How do they describe and differentiate the three levels of gender mainstreaming?

Step 3: Help and let them to discuss and reflect their point of view to other groups.

Step 4: Summarize the activity using trainer's note.

Trainer's Note

2. Levels of Gender Mainstreaming

2.1. Macro Gender Mainstreaming Level

Macro/Policy Level refers to high level policy and broad based approaches. It emphasizes legal instruments and system level mainstreaming within constitution, legislation & policy, and national level plans.

2.2. Meso Gender Mainstreaming Level

Meso gender mainstreaming level focuses on engendering organizational or institutional structures and systems. Gender Audit is an assessment tool that helps to understand the situation at the organizational or institutional level.

This gender mainstreaming level emphasizes on identification and development of data collection methods and tools:

- Engendering Vision, Mission, Values
- Establishing strong and committed leadership
- Designing and employing gender responsive strategic framework
- Enhancing inclusiveness of Human Resource deployment manual and other strategy document
- Promoting gender responsive organizational culture
- Improving gender based technical capacity and budgeting
- Strengthen partnership & networking
- Promoting sense of shared responsibility across organization structure for gender equality
- Ensuring inclusiveness of organizational change plan
- Enhancing Inclusion gender in administrative accountability procedures

2.3. Micro Gender Mainstreaming Level

Micro gender mainstreaming level; the so called Program/Project and Community level of gender mainstreaming is discuss on a set of complementary gender and causal analysis & mainstreaming tools will be employed to identify real situations in order to better contextualize the interventions of the given field of development/locality.

Session Three: - Gender Mainstreaming Tools and Techniques

| | |
|----------------------------|--|
| Session Three | Gender Mainstreaming Tools and Techniques |
| Duration | 30 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none">▪ Explain gender mainstreaming tools and techniques |
| Content | <ul style="list-style-type: none">▪ Analytical tools and techniques▪ Educational tools and techniques▪ Consultative and participatory tools and techniques |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 3: Brainstorming on Gender Mainstreaming Tools and Techniques

Duration for the activity: 15 minutes

Step 1: Divide in to small groups in the way that it ensures gender balance.

Step 2: Let trainees to discuss and reflect on the following questions;

- What are the basic tools and techniques for mainstreaming gender?
- What is the meaning of this gender mainstreaming tools and techniques?

Step 3: Summarize the discussion using trainer's note.

Trainer's Note

3. Gender Mainstreaming Tools and Techniques

Gender mainstreaming tools and techniques are categorized into three. These are;

- Analytical tools and techniques
- Educational tools and techniques
- Consultative and participatory tools and techniques

3.1. Analytical Tools and Techniques

Analytical tools and techniques include those delivering information necessary for the development of policies and those which can be used in the policy process itself:

- Gender analysis, gender audit, checklists and statistics split up by sex
- Surveys and forecasts regarding gender relations
- Cost-benefit analyses from a gender perspective, guidelines and Tor
- Research in gender studies and gender impact assessment
- Monitoring, comprising regular reporting and meetings

3.2. Educational Tools and Techniques

Educational tools and techniques contain awareness-raising and transfer of knowledge:

- Awareness-raising and training courses
- Follow-up action via post-training follow-ups, meeting or mentoring
- Special experts joining a unit for some time/flying or mobile experts
- Manuals/handbooks (to be used during and after the training) or booklets and leaflets for the general public
- Educational material for use in schools

3.3. Consultative and Participatory Tools and Techniques

This tools and techniques make gender equality experts and other experts work together:

- Think tanks, working or steering groups
- Participation of both sexes in decision-making
- Conferences, seminars, aimed at informing the public and those concerned by the policies
- Hearings (to help people participate in the policy-making process)

Session Four: - Prerequisites and Challenges for Mainstreaming Gender

| | |
|----------------------------|--|
| Session Four | Prerequisites and Challenges for Mainstreaming Gender |
| Duration | 30 minutes |
| Learning Objectives | By the end of this session trainees will be able to Identify: <ul style="list-style-type: none"> ▪ Prerequisites for a successful gender mainstreaming, ▪ Challenges and measures taken of gender mainstreaming. |
| Content | <ul style="list-style-type: none"> ▪ Prerequisites for a successful gender mainstreaming ▪ Challenges and measures taken for gender mainstreaming |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 4: Group Discussion on Prerequisites and Challenges for Gender Mainstreaming

Duration for the activity: 15 minutes

Step 1: Divide in to small groups in the way that it ensures gender balance.

Step 2: The trainer will ask trainees to discuss on the following points;

- Pre-requisite for successful gender mainstreaming.
- Challenges and measures/solution of gender mainstreaming.

Step 3: Let them to present and reflect their findings and point of view to other groups.

Step 4: Summarize the activity using trainer's note.

Trainer's Note

4. Prerequisites and Challenges for Mainstreaming Gender

As we strive to ensure gender equality and gender equity through mainstreaming gender issues into the operating systems of organizations and institutions, we may have prerequisites or opportunities for incorporate it successfully or else we may face a variety of challenges and from a different of sources and perspectives.

4.1. Prerequisites for a Successful Gender Mainstreaming

The prerequisites and opportunities for mainstreaming gender successfully are;

- Political will;
- Gender equality policies/strategies;
- Structures and mechanisms (gender unit, experts);
- Availability of sex-disaggregated data;
- Knowledge of gender issues;
- The involvement of both women and men;
- Accountability and evaluation frameworks; and
- Necessary funds/finance and human resources.

4.2. Challenges and Measures Taken for Gender Mainstreaming

The most common challenges and measures should be take are set out here;

| Challenges | Measures Taken |
|--|---|
| <i>Lack of gender mainstreaming concept</i> | <ul style="list-style-type: none">➤ Capacity building on gender mainstreaming➤ Working with gender experts |
| <i>Inadequate gender-sensitive data</i> | <ul style="list-style-type: none">➤ Collect sex-disaggregated and gender-sensitive data |
| <i>Seeing gender as an optional (add-on) program component</i> | <ul style="list-style-type: none">➤ Treat gender as cross-cutting issue➤ Ensure all staff is accountable for gender mainstreaming (JD, performance evaluation, etc.) |
| <i>Lack of political and economic commitment</i> | <ul style="list-style-type: none">➤ Have top leadership/SMT accountable➤ Ensure gender-responsiveness of budget |

Gender Mainstreaming Training Manual



Chapter 3



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Chapter Introduction

Gender analysis is a form of systematic socio-economic analysis. Also it analyzes data to inform policy making as well as project and program design, implementation, monitoring and evaluation at all levels. There are various gender analysis tools available at different times to respond to special development questions and problems. Gender analysis helps to understand the gender issues and to identify the gender Gap.

Hence, this chapter involves a deeper understanding on the concepts of gender analysis in addition to the basic components so as to demonstrate basic skills in implementing and adapting gender analysis in different situations.

Contents

The chapter comprises the following sessions;

- Session One: Meaning and Purpose of Gender Analysis
- Session Two: Basic Steps in Gender Analysis
- Session Three: Gender Analysis Levels
- Session Four: Gender Analysis Frameworks and Tools

Objectives

At the end of this chapter the participants will be able to:

- ☉ Explain the main concepts and purpose of Gender Analysis,
- ☉ Identify and describe the Gender Analysis Steps,
- ☉ Differentiate Gender Analysis Levels, and
- ☉ Understand the application of Gender Analysis Frameworks and Tools.

Chapter Duration

- 7 Hours

Methodology

- Lecture
- Questions
- Reflection
- Brainstorming
- Group Discussions
- Case story

Required Material

- LCD Projector
- Laptop Computer
- Flip Chart
- Markers
- Pens
- Note Book
- Colour Paper
- Handout
- Masking Tape
- Sticker Note
- Hard paper
- Case study

Session One: - Meaning and Purpose of Gender Analysis

| | |
|----------------------------|---|
| Session One | Meaning and Purpose of Gender Analysis |
| Duration | 30 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none">▪ Define the Concept of Gender Analysis▪ Explain the Purpose of Gender Analysis |
| Content | <ul style="list-style-type: none">▪ Definition of Gender Analysis▪ Purpose of Gender Analysis |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 1: Experience Sharing on Socio-Economic Analysis

Step 1: Power Point Presentation of basic concepts of gender analysis, the purpose of GA and its intended outcomes.

Step 2: Ask the participants to explain a situation in their respective communities or sectors on how resource (e.g., at household, community, institution) are shared between women and men.

Step 3: Let them discuss and agree on the positive and negative implications on those involved.

Step 4: Invite them to suggest what should be done to address the negative implications identified in step3.

Step 5: Conclude the discussion using trainer's note.

Trainer's Note

1. Meaning and Purpose of Gender Analysis

1.1. Meaning of Gender Analysis

Gender analysis is a variety of methods used to understand the relationship between men and women, their access to resource, activities, their constraints and challenges they face in relative to each other with a view of identifying gaps, addressing and raising concerns.

- Its goal is to integrate a gender perspective into all stages of program/policy cycle and day-to-day organizational activities.
- It starts when issues or problems are identified and continues through every stage of the policy process.

The Gender Analysis process will;

- Challenge the assumption that everyone is affected by policies, programs and legislation in the same way regardless of gender.
- Uncovers underlying causes of inequity; increases the accuracy of information inputs; and produces options which increase the predictability of outcomes.
- Increase equity in our society.
- Generate quantitative and qualitative data disaggregated by gender, ethnicity and other factors relevant to the particular policy issue.

Moreover, Gender analysis is an important part of policy analysis that identifies how public policy, program and projects affect men and women differently. It aims to uncover the dynamics of gender differences across a variety of issues. These include gender issues with respect to:

- **Social relations** -how 'male' and 'female' are defined in the given context; their normative roles, duties, responsibilities
- **Activities** - gender division of labor in productive and reproductive work within the household and the community
- **Access and control** -over resources, services, institutions of decision-making and networks of power and authority
- **Needs** -the distinct needs of men and women, both practical needs (i.e. Given current roles, without challenging society) and strategic needs (i.e. needs which, if met, would change their position in society)

- **Impacts** -the differential impacts of policies, programs and projects on men and women and boys and girls.

1.2. Purpose of Gender Analysis

The purpose of gender analysis is to reveal the connection between gender relations and the development problem to be solved.

Gender analysis of various kinds is required to bring gender inequalities to the surface and to the attention of people who can make a difference, so that their decisions are taken in a manner that is sensitive to and reflects the outcome of gender analysis. Information from gender analysis is essential for decision maker sat all levels to consider when they formulate national legislation and policy and when they plan and monitor specific interventions.

The outcomes of Gender Analysis

There are key findings that are expected while conducting a gender analysis which are useful in the processes of formulating recommendations. These key findings include:-

- Gender Awareness
- Analysis of the division of labour
- Access and Control
- A review of women's priorities
- Recommendation to address women's practical needs and/or strategic interests

Session Two: - Basic Steps of Gender Analysis

| | |
|----------------------------|---|
| Session Two | Basic Steps of Gender Analysis |
| Duration | 60 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none">▪ Describe the basic steps of gender analysis▪ Demonstrate the application of gender analysis steps |
| Content | <ul style="list-style-type: none">▪ Identification and Development of Data Collection Methods and Tools▪ Collecting Sex and Gender Disaggregated Data▪ Analysis of Collected Data▪ Formulation of Gender Action Plan |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |

Trainer's Note

2. Basic Steps in Gender Analysis

There are important steps that need to be taken in gender data analysis and experts can implement a variety of methods at the policy, program, and project levels. However, there are 3 common and basic steps that should be followed in all types and stages of gender analysis. These are;

- Identification and Development of Data Collection Methods and Tools
- Data Collection
- Analysis of Collected Data
- Formulation of Gender Action Plan

2.1. Step 1: Identification and Development of Data Collection Methods and Tools

The methods of data collection depend on the specific context and availability of data. Ideally, a mix of quantitative and qualitative method of data collection should be used. The essence of what kind of data should be gathered depends on the problem to be solved and the gender analysis framework chosen for this purpose. Some of the methods include;

- **Desk review:** An initial analysis of existing documentation, including relevant legislation, national policies, budgets, government and non-government publications, household surveys, records of institutions, demographic health surveys, etc.
- **Survey:** A collection of quantitative data using questionnaires developed based on the appropriate gender analysis tools and frameworks
- **Semi-structured Interviews:** Interviewing key stakeholders including women's organizations can provide valuable information.
- **Focus group discussions:** These can be useful to gather information from societal groups with specific knowledge and experience.
- **Observation:** Gather information by systematically observing the behavior of the research participants in relation to the problem to be studied and addressed.



Activity 2: Brainstorming on sex disaggregated data and gender disaggregating data

Step 1: Ask participants to brainstorm on the difference between sex & gender disaggregated data?

Step 2: summarize the activity using trainer's note.

Trainer's Note

2.2. Step 2: Collecting Sex and Gender Disaggregated Data

This refers to collecting data that disaggregate based on sex and gender. This means that we must count both males and females when gathering information for planning, implementing, monitoring and evaluating development activities.

Sex-disaggregated data

Sex-disaggregated data gives the straightforward numbers of males and females in a given population. It is quantitative statistical information on differences and inequalities between women and men. Sex disaggregated data might reveal, for example, quantitative differences between women and men in morbidity and mortality; differences between girls and boys in school attendance, retention and achievement; differences between men and women in access to and repayment of credit; or differences between men and women in voter registration, participation in elections and election to office.

Some sample questions for sex disaggregated data:

- How many women and men are member of Ethiopian trade association?
- Have women and men entrepreneurs consulted during business development?

Gender disaggregated data

Gender disaggregated data reveals the relationships between women and men that underlie the numbers. Gender analytical data, on the other hand, is qualitative information on gender differences and inequalities. Gender statistics provide factual information about the status of women, for example a change in their status over time. They do not have to be disaggregated by sex. For example, “23% of Ministry of Trade and regional integration leadership position are occupied by women; 22% female factory worker report experiencing domestic violence at least once in their lives”.

2.3. Step 3: Analysis of Collected Data

What is Data Analysis?

The term data analysis is generally defined as a process of inspecting, transforming, and modelling data with the goal of highlighting useful information, suggesting recommendations, and supporting decision making.

In the case of quantitative data analysis the collected data is analyzed using different software such as SPSS; Excel to come up with statistics and facts. The qualitative data could be analyzed through narrative or theme analysis. Data analysis in both cases can be done by cross tabulating different variables such as demographic profile, economic and social status.

2.4. Step 4: Formulation of a Gender Action Plan

After data is analyzed, the next step is to formulate recommendation for action to integrate gender into policy decisions, program planning and employment practice and to fill the gap between men and women identified in the analysis.

Questions to be asked in formulating an action plan

- Seeking the perspectives women and men in developing the options and assessing their costs, benefits, acceptability and practicality.
- Explaining the consequences of the recommended option in light of government’s commitment to gender equity,
- What are the consequences of not adopting a gender-sensitive option?

Components of Gender Action Plan

- **Objective** - What is to be achieved in view of addressing the gender disparity
- **Action** - What is to be done towards achieving the objective
- **Target** - Where do we aim to be after completing the action plan
- **Responsible body** - Who is responsible to implement the action plan
- **Baseline data** - What is the starting point
- **Indicator and means of verification** - What are the evidences of change and where will such data be derived from. Indicator is the unit of measurement that is used to monitor or evaluate the achievement of project objectives over time. Indicators can include specification of quantifiable targets and measures of quality.
- **Time frame** - What is the timeframe in which this should be completed?
- **Budget** - What is the budget required for this action to be completed.



Activity 3: Group work on Gender Action Plan Formulation on work life balance

Develop an action plan to create conducive work environment for women employee in MoTRI.

Step 1: Facilitate a brainstorm so that trainees could share their experiences in developing an action plan.

Step 2: Let them discuss in group and design an action plan to balance the time of women employee in the ministry.

Step 3: Ask them to present to the plenary

Step 4: Summarize the activity using trainer's note.



Trainer's Tips

- The developed action plan should entertain:-

- ✓ Title of the project
- ✓ Activities
- ✓ Time of accomplishment
- ✓ Stakeholders
- ✓ Budget
- ✓ Budget source.

There are a lot of templates/frameworks to do an action plan. For this reason, the trainer should be flexible as to the templates as long as all the elements needed for the plan are included. (I.e. Strategic Objective, Action, Responsible body or person, Baseline, Targets or Indicators, Time, Budget and Budget Source).

A Sample Action plan with basic templates Framework Project Title: Gender Action Plan for MoTRI
Managerial role.

| Objective | Action | Who | Baseline | Targets | Indicator | When | Budget | Budget Source |
|---|------------------------------------|-------------------------|--|---|---|-------------------------|--------|--|
| To increase the representation of women in MoTRI managerial role from 20 % to 50% | Mobilization of women as managers. | Women employee of MOTRI | Women make up 20% of the managerial position | Increase the representation of women in the managerial position of MoTRI to 50% | Rate of Increase of women leadership in MoTRI | In the upcoming 2 years | x | Allocation from MoTRI and other development partners |



Trainer's Tips

Ensuring implementation and follow-up of the gender action plan

Translation of a gender action plan into practice is the most difficult stage due to various reasons that include resistance, lack of technical skill in gender mainstreaming, lack of accountability and political will. Hence, one has to consider the following key factors to facilitate the effective implementation and realization of the gender analysis action plan.

- **Personnel**

- Specialized expertise in gender issues and/or sector-specific needs;
- Knowledge, attitude and technical skill of personnel to be involved in the implementation of the gender action plan;
- Equal participation of female and male staff in the implementation process;

- **Organizational Systems and Structures**

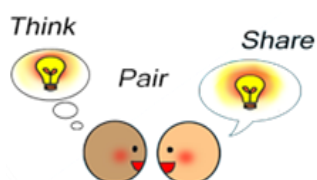
- The availability of gender office or focal persons with appropriate autonomy and authority;
- Availability of accountability mechanisms for gender mainstreaming;

- **Finances**

- An allocation of financial resources and adequate funding should be provided for the implementation of the proposed gender analysis action plan.

Session Three: - Gender Analysis Levels

| | |
|----------------------------|--|
| Session Three | Gender Analysis Levels |
| Duration | 60 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none"> ▪ Identify and analyze gender analysis levels |
| Content | <ul style="list-style-type: none"> ▪ Macro level gender analysis ▪ Meso level gender analysis ▪ Micro level gender analysis |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 4: Think Pair Share

Duration for the activity: 20 minutes

Step 1: Divide participant into pairs.

Step 2: Let them share their ideas with each other to Identify macro level policies, laws, strategies and programs.

Step 3: Let each pair present the advantages and disadvantages of the selected policies on Women and men. Let them prepare two columns; one “WOMEN” and the other “MEN”.

Step 4: Ask participants which gaps require policy intervention.

Step 5: Summarize the activity using trainer’s note.



Trainer's Tips

For example, this activity will result as follows:-

Impact of Trade policy for women and men

| For Women | For Men |
|---|----------------------|
| Economic empowerment | Economic empowerment |
| Profit maximization | Profit Maximization |
| Job opportunity for women entrepreneur through provision of special support for females | |

Trainer's Note

3. Gender Analysis Levels

3.1. Macro Level Gender Analysis

Macro level gender analysis helps to identify how national policy, legal and regulatory frameworks affect the enjoyment and exercise of rights by men and women in the different spheres of life. For instance such an analysis will look into property rights, civil and political rights of men and women.

Macro level analysis examines factors such as sociocultural, economic, demographic and legal policies and practices that influence the gender context, in which the program operates, may include agricultural policies, migration statistics, health systems, inheritance laws, etc.

A guide for Macro Level Gender Policy Analysis

- Identifying the Issue
- Defining Desired/Anticipated Outcomes
- Gathering Information
- Conducting Research
- Developing and Analyzing Options
- Making Recommendations
- Communicating the Policy
- Evaluating the Analysis

3.2. Meso Level Gender Analysis

On the meso-level the focus is on the activities, discourses and identities/belongings of collective actors in political organizations, social movements and networks. The meso-level analysis could be to explore women's mobilization and participation and identities within different organizations, e.g. comparing their participation and representation in social movements and political parties. On the organizational level the question is where women as a group as well as individuals are positioned in the formal and informal organizational structure.

At organizational level key issues to be considered during Meso Level Gender Analysis are:-

- Commitment of the management and decision makers to gender equality and equity
- Allocation of adequate budget
- Competency/capacity of personnel on gender analysis and mainstreaming
- Availability of procedures and tools for gender mainstreaming
- Gender friendly organizational culture
- Responsibility and accountability of personnel to integrate gender
- Gender friendly language and communication.

3.3. Micro Level Gender Analysis

Micro level gender analysis gives insight to gender relations and trends at the household and community level and is set within the context provided by the macro analysis.

To understand gender relations at the local level, most gender analysis frameworks recommend collecting information in four specific areas:

- Gendered division of labor and workload (who does what, when?)
- Gendered access to and control over resources, such as land, information, money, education, jobs, new technologies, health services, housing, transport, leisure, etc.
- Gendered participation in decision-making
- Views and expectations of women and men concerning the proposed project

In general, Data at micro level should be collected at household and community level both from men and women and different categories of men and women as necessary.



Activity 5: Group Work on Gender based analysis of an economic measure case

Duration for the activity: 20 minutes

Step 1: Present the following case to the participants.

Government of Ethiopia has lifted the subsidy on fuel including kerosene. Analyze how this measure will impact on the lives of men and women as well as functioning of institutions including the market and state machineries.

Step 2: Divide participants in groups.

Identify macro level policies, laws, strategies and programs.

Step 3: Let the participants to identify the level based on the trainer's note.

Step 4: Let the participants analyze the case to draw out the gendered impact of The measure.

Step 5: Summarize the activity using trainer's note.

Session Four: - Gender Analysis Frameworks and Tools

| | |
|----------------------------|---|
| Session Four | Gender Analysis Frameworks and Tools |
| Duration | 240 minutes |
| Learning Objectives | <p>By the end of this session trainees will be able to:</p> <ul style="list-style-type: none"> ▪ Identify the types of gender analysis frameworks, ▪ Describe the application of the gender analysis frameworks, ▪ Clarify gender analysis frameworks relationships and difference, and ▪ Explain the use and limitation of each frameworks. |
| Content | <ul style="list-style-type: none"> ▪ The Harvard Analytical Framework (Gender Roles Framework) ▪ The Moser (Triple Roles) Gender Planning Framework ▪ Gender Analysis Matrix (GAM) Framework ▪ Women's Equality and Empowerment (LONGWE) Framework ▪ People Oriented Framework, ▪ The Social Relations Approach Framework, ▪ SWOT and ▪ Force field Analysis. |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |

Trainer's Note

4. Gender Analysis Frameworks and Tools

Frameworks are approaches used to generate data and information during gender analysis.

There are a number of different gender analysis frameworks;

The most commonly used are;

- The Harvard Analytical Framework (Gender Roles Framework)
- The Moser (Triple Roles) Gender Planning Framework
- Gender Analysis Matrix (GAM) Framework
- Women's Equality and Empowerment (LONGWE) Framework
- People Oriented Framework,
- The Social Relations Approach Framework,
- SWOT and
- Force field Analysis.

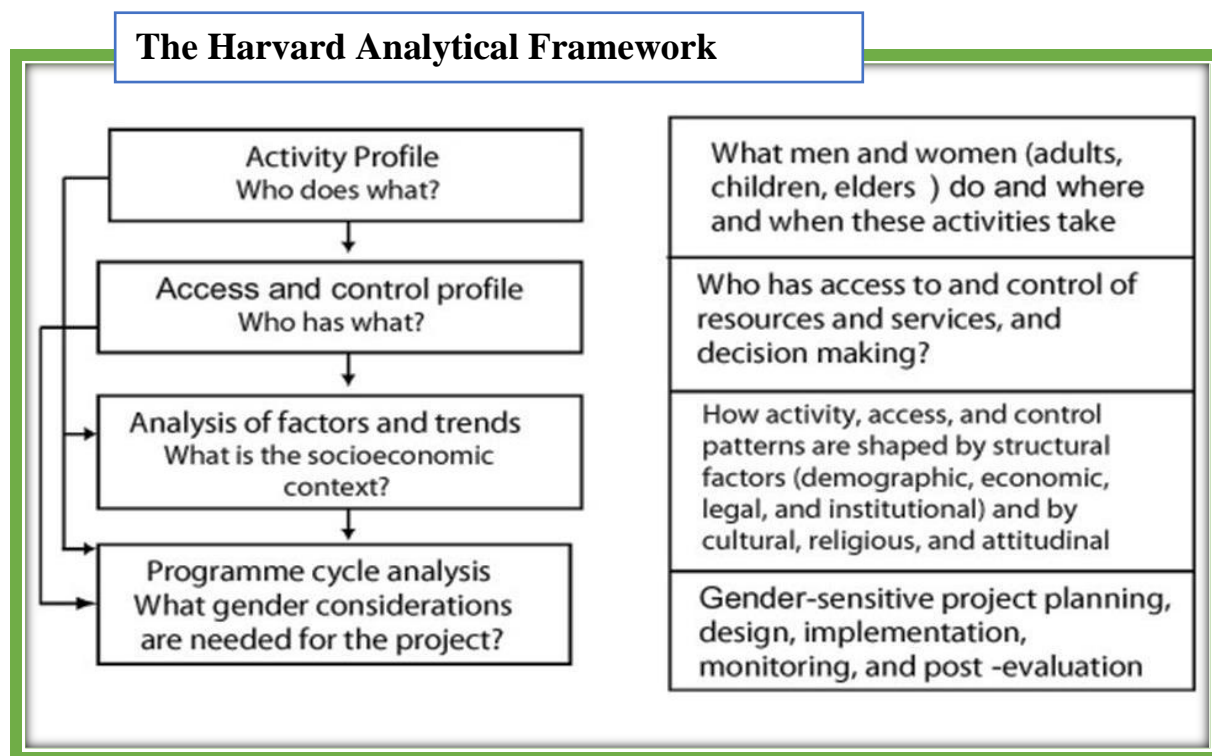
4.1. Harvard Analytical Framework (Gender Roles Framework)

The Harvard Analytical Framework was one of the first Gender Analysis Frameworks. It developed by researchers at the Harvard Institute for International Development in the USA in collaboration with the Women in Development Office of USAID in 1985. The Harvard Analytical Framework was designed to demonstrate that there is an economic case for allocating resources to women as well as men. Assist to analyze that both men and women are involved in development as actors and beneficiaries. As such there is economic sense in allocating resources to both. It is most useful for projects that are agriculturally or rurally based.

The Harvard Analytical Framework is a grid (matrix) for collecting data at the micro level (Community and household) and provides a useful way of organizing information, which can be adapted to many different situations.

It has four interrelated components: This are-

- Tool 2: Activity profile
- Tool 2: Access and Control Profile — Resources and Benefits
- Tool 3: Influencing Factors:
- Tool 4: The Project Cycle Analysis:



Tool 1: The Activity Profile: This tool assists in identifying the productive and socially reproductive activities of women and men, girls and boys. It has been adapted to reflect community activities and also to look at who does what, where, when and for how long. This process helps to understand the gender division of labor within the community and how it can be addressed. Other data disaggregated by sex, age or other factors can also be included. It can record details of time spent on tasks and their location.

| Activities | Who does the work? | |
|-----------------------------|--------------------|-----|
| | Women | Men |
| Household tasks | | |
| Cleaning | | |
| Fetching firewood/Water | | |
| Preparing food | X | |
| Take care of children | | |
| Washing clothes | X | X |
| Productive activities | | |
| Land preparation | | X |
| Cultivation and maintenance | | |
| Harvest/Post-harvest | X | X X |

Tool 2: Access and Control Profile — Resources and Benefits: With this tool the resources Women and men use to carry out the tasks identified in the activity profile can be listed. It identifies based on their gender role, whether women or men have access to resources, which controls their use, who is in the household or community controls the benefits from them (benefits can include outside income, basic needs, training) and who has final decision making powers (control) over them.

| Resources | Access | | Control | | Remarks |
|------------------------|--------|-----|---------|-----|---------|
| | Women | Men | Women | Men | |
| Land | | | | | |
| Fertilizer | | | | | |
| Seed | | | | | |
| Oxen | | | | | |
| Sheep/goat | | | | | |
| Chicken | | | | | |
| Dairy cows | | | | | |
| Agricultural equipment | | | | | |
| Training | | | | | |
| Credit | | | | | |
| Water | | | | | |
| Fuel wood | | | | | |
| Others | | | | | |

Tool 3: Influencing Factors: these are a list of factors which determine the gender differences identified in the Activities and Access and Control profiles. It includes factors that shape social relations. It is important to identify influencing factors since they present opportunities and constraints in project and program development. Understanding influencing factors helps to identify entry points for appropriate interventions and options for change. In program terms, this can help in identifying appropriate inputs for different projects. Influencing factors can be many and broad. They include but are not limited to culture/tradition, education religion, politics, economics, environment, wars, legal, demographic trends, exposure, etc. For proper targeting and strategizing, planners need to understand these factors and to what extent they are amenable

Tool 4: The Project Cycle Analysis: This is a list of questions that the user can apply to a project proposal or area of intervention to examine it from a gender perspective using sex disaggregated data, and charting the differential effects. This last component takes the project in its entirety and applies the three foregoing components to determine how gender interacts with each project stage enumerated below.

Identification: Needs assessment, objective formulation

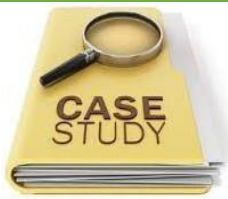
Design: anticipate implications to men and women considering access and control issues.

Implementation: Ensuring balance in participation.

Evaluation: Assessing differential impact on women and men.

Potential limitations of the Harvard Analytical Framework

It has a perspective that is oriented around efficiency rather than equity, focusing on allocating new resources in order to make a program more efficient rather than addressing unequal gender relations. It tends to focus on material resources rather than on social relationships. The analysis can be carried out in a non-participative way without the involvement to women and men from a community.



Activity 6: Case Study of factory X

In factory X, the work of the factory is predominantly the responsibilities of the women, while the managerial role has been dominated by men. Work on the factory can be divided into several main activities: men and women are involved in these activities differently. First, the factory has to be cleared from wastes: offices, toilets and the compounds have to be cleared from wastes which are done by women. Managerial role is predominantly a male activity whereas support activities are exclusively a female job. Women also perform activities within the domestic sphere such as cooking, washing, child care.

To improve the situation of women a development program is going to be developed. What kind of a project would be appropriate to address the problem faced by women? Come up with a project idea after analyzing the problem using Harvard Analytical Framework.

Step 1: Use the tables provided to structure your analysis.

Step 2: Where you are unable to fill a category because of lack of information, you could enter a question mark.

Step 3: Use a scale to fill a matrix quantitatively (5-a greater deal of time and 1-little time), plus/minus sign etc.

Step 4: Upon completion of the table; consider the development programs which are being carried out in the factory.

Step 5: Which of the programs in fact seems to bring the most benefits to women?



Trainer's Tips

Help participants to pick appropriate profile out of Harvard Analytical Framework and to fill the matrix using an appropriate data out of the case presented.

4.2. The Moser (Triple Roles) Gender Planning Framework

The Moser Framework (gender planning) was developed as a planning tradition in its own right. The Moser framework has a wide appeal and can be used for planning in a variety of settings from NGOs to government ministries. It recognizes that there may be institutional/political resistance to addressing and transforming gender relations. The framework approaches development-planning challenges, unequal gender relations as well as supports the empowerment of women. The concept of practical and strategic gender needs is a very useful tool for evaluating the impact of a development intervention on gender relations. The triple role concept is useful in revealing the wide range of work that women engage in. Furthermore, it also alerts planners to the interrelationship between productive, reproductive and community roles.

There are six tools in the framework that can be used for planning at all levels;-

Tool 1: Gender roles identification/triple role

This tool includes making the gender division of labor visible. It can be carried out by mapping out all the activities of men and women (can include also girls and boys) in the household over a twenty-four hour period. Moser identifies the triple role for women as productive, reproductive and community management roles.

A. Productive work:

This is work that produces goods and services for consumption by the household or for income and is performed by both men and women. Women's productive work is often carried out alongside their domestic and childcare responsibilities (reproductive work) and tends to be less visible and less valued than men's productive work.

B. Reproductive work:

This work involves the bearing and rearing of children and all the tasks associated with domestic work and the maintenance of all household members. These tasks include cooking, washing clothes, cleaning, collecting water and fuel, caring for the sick and elderly. Women and girls are mainly responsible for this work, which is usually unpaid.

C. Community roles or work:

Women's community activities include provisioning and maintenance of resources, which are used by everyone, such as water, healthcare, and education. These activities are undertaken as an extension of their reproductive role and are normally unpaid and carried out in their free time. Politics and activities of such nature also fall under community work. However, in most parts of this world men are mainly involved in politics at the community level. Even though this work may be paid or unpaid, it definitely increases men's status in the community.

Tool 2: Gender Needs Assessment

Moser developed this tool from the concept of women's gender interests, which was first developed by Maxine Molyneux in 1984. Women have particular needs because of their triple role as well as their subordinate position to men in society. Women's needs differ from men's needs and a distinction is made between practical gender needs and strategic gender interests/needs.

A. Practical gender needs:

Women and men can easily identify these needs as they often relate to living conditions. Women may identify safe water, food, health care and cash income, as immediate interests/needs that they must meet. Meeting women's practical gender needs is essential in order to improve living conditions, but in itself it will not change the prevailing disadvantaged (subordinate) position of women. It may in fact reinforce the gender division of labor.

B. Strategic gender interests/needs:

Strategic gender interests/needs are those that women themselves identify as due to their subordinate position to men in their society. They relate to issues of power and control, and to exploitation under the sexual division of labor. Strategic interests/needs may include changes in the gender division of labor (women to take on work not traditionally seen as women's work, men take more responsibility for child care and domestic work), legal rights, an end to domestic violence, equal wages and women's

control over their own bodies.

They are not as easily identified by women themselves as their practical needs; therefore, they may need specific opportunities to do so. Practical and strategic gender interests/needs should not be seen as entirely distinct and separate, but rather as a continuum. By consulting women on their practical gender needs provides entry points to address gender inequalities in the longer term so that strategic gender interests/needs can be created.

Tool 3: Desegregating control of resources and decision-making within household

(Intra household resource allocation and power of decision-making within the household)

As mentioned above, men and women have differential access and benefits to several resources, both within and outside of the household. An analysis of intra household resource allocation can be used to find out who has control over resources within the household, who makes decisions about the use of these resources, and how they are made. This is also an important step in the gender analytical process so that equitable development projects and policies can be designed.

Tool 4: Balancing of roles

This relates to how women manage the balance between their productive, reproductive and community tasks. It asks whether a planned intervention will increase a women's workload in one role with consequences for her other roles.

Tool 5: WID/GAD policy matrix

The WID/GAD policy matrix provides a framework for identifying/evaluating the approaches that have been (or can) be used to address the triple role of women and the practical and strategic gender needs of women in programs and projects.

Tool 6: Involving women, gender aware organizations and planners in planning:

The aim of this tool is to ensure that practical and strategic gender needs are identified by women ensuring that ‘real needs’ as opposed to ‘perceived needs’ are incorporated into the planning process.

Potential limitations of Moser Frameworks

- Framework does not mention other inequalities like class, race and ethnicity
- Framework is static and does not examine change over time.
- Looks at separate rather than interrelated activities of women and men.
- Strict division of practical and strategic need not always helpful in practice
- Strategic needs of men not addressed.
- Note everyone accepts the concept of the triple role, particularly in relation to community roles.

4.3. Gender Analysis Matrix (GAM) Framework

The GAM was developed by Rani Parker in collaboration with development practitioners working for a Middle Eastern NGO. The GAM is influenced by the 51 GENDER ANALYSIS reality and ideology of Participatory planning. The GAM can accommodate constraints imposed by shortages of Funding and time, illiteracy, and insufficient or non-existent quantitative data on gender roles. The overall aim of the GAM is to help determine the different impact development interventions have on men and women, by providing a community based technique for identifying and analyzing gender differences. The analysis is conducted at four levels of society-women, men, household and community. The GAM examines impact on four areas;

- ✓ Labour
- ✓ Time
- ✓ Resources
- ✓ Socio-cultural factor

Uses of GAM

- It is simple, systematic and uses familiar concepts.
- It encourages “bottom-up analysis” through community participation.

- It is transformational and technical in its approach, combining awareness-raising about gender inequalities with development of practical skills.
- It includes men as a category and can be used in interventions that target men.

Potential limitations of GAM

- The analysis must be repeated in order to capture changes over time.
- The GAM does not make explicit which women and which men are most likely to experience positive or negative impacts. It does not include either macro or institutional analysis.



Activity 7: Group work on Gender Analysis Matrix for shoes export project case

The goal of the project: is to create job opportunity for women and men through the introduction of high tech shoe technology and provision of quality inspection and support services for entrepreneurs.

| | Labour | Time | Resources | Culture |
|-----------|--|---|--|--|
| Women | Save women energy to produce shoes | Time saved for other activities | Production of quality export standard shoe | It attract /encourage women entrepreneur |
| Men | Acquire skill in shoes Plant management | managing the shoe plant take more time | reduce wastage of resources | Reduce market share on shoe expert |
| Household | Get extra laborer for household chores | women have more time for childcare and Cleaning/ women able to manage woke life balance | Better income and modern living | mostly women available at home |
| Community | Aware about quality shoe production Technology | Less time for men and Women | Modern design, standard packaging and quality shoe | women involved at community Level |

Step 1: Divided participants in group and ask to read the table above.

Step 2: Ask participants whether the effects are positive?

Step 3: Are they in line with the intended outcome?

Step 4: Are these outcomes empowering to women?

Step 5: Which are the unexpected and negative outcomes?

Step 6: Summarize the note using trainer's note.

Trainer's Note

4.4. Women's Equality and Empowerment (LONGWE) Framework

Sara Longwe, a consultant on gender and development based in Lusaka, Zambia, developed. The Women's Empowerment Framework to help planners question what women's equality and empowerment means in practice, and to critically assess the extent to which development interventions are supporting this empowerment. Longwe defines women's empowerment as enabling women to take an equal place with men, and to participate equally in the development process, in order to achieve control over factors of production on an equal basis with men. The Longwe Framework shares some common ground with the Moser Framework's concept of practical and strategic gender needs. However, Longwe moves beyond the notion of separate needs showing in the framework that development interventions can contain both.

Longwe's framework is based on the idea of five different levels of equality (welfare, access, Conscientization, participation, and control) and the extent to which these are present in any area of social or economic life determines the level of women's empowerment. The framework also enables gender and development practitioners to analyse organization's degree of commitment to women's equality and empowerment.

Tool 1: Levels of Equality

The Framework suggests that women's advancement can be understood in terms of a concern with the five levels of equality shown below. Empowerment is a necessary part of the development process at each level for women to advance to the next level, and for them to advance progressively through all the levels towards equal status with men.

| LEVELS OF EMPOWERMENT | DESCRIPTION |
|-----------------------|---|
| CONTROL ↑ | Women and men have equal control over factors of production and distribution of benefits, without dominance or subordination. |
| PARTICIPATION ↑ | Women have equal participation in decision-making in all programs and policies. |
| CONSCIENTIZATION ↑ | Women believe that gender roles can be changed and gender equality is possible. |
| ACCESS ↑ | Women gain access to resources such as land, labor, credit, training, marketing facilities, public services, and benefits on an equal basis with men. Reforms of law and practice may be prerequisites for such access. |
| WELFARE | Women's material needs, such as food, income, and medical care, are met. |

Welfare: This is defined as the levels of women's material welfare (income, food supply, healthcare) relative of men.

Access: This is understood in the frameworks as women's equality of access with men to the factors of production such as land, credit, labor, training, marketing facilities and all public services and benefits. Equality of access is linked to equality of opportunities, which usually needs reform of the law to remove all forms of discrimination against women.

Conscientization: this concept relates to being aware of the difference between sex and gender, and to recognize that gender roles are cultural and can change. The sexual division of labor should be fair to both men and women and both should agree with it. Neither women nor men should dominate the other, economically or politically. The base of gender awareness is a belief in sexual equality.

Participation: This is defined as women's equal participation with men at all levels of Decision making, policy development, planning and administration. It relates Particularly to development projects where participation at all stages of the project cycle inessential.

Control: Women's Conscientization and mobilization can contribute to achieving control over the decision making process, in order to achieve a balance of control between women and men over resources and benefits.

Tool 2: Level of recognition of "women's issues"

As well as assessing the level of women's empowerment that a development project wishes to address, it is also necessary to establish to what extent women's issues are being recognized or ignored in the project objectives. A "women's issue" is defined by Longwe as all issues which relate to equality with men, and includes any social or economic roles, and all levels of equality (welfare, access, Conscientisation, participation and control). The three levels of recognition of women's issues in project design are identified:

Negative level: There is no reference to women's issues in the project objectives. It is likely that the project will have a negative impact on women.

Neutral Level: Women's issues are included but there is doubt as to whether the outcomes will be positive for women.

Positive Level: Project objects are positively concerned with women's issues and with improving women's position relative to men.

Potential limitations: The framework is not complete, as it does not take into account a number of aspects. It does not track how situations change over time. The relationship between men and women is examined only from an equality perspective, failing to take account of the complex system of rights, claims, and responsibilities that exist between them. By not taking into account other forms of inequality, women may be seen as a homogenous group. Using hierarchy of levels may give the impression that empowerment is a linear process.

4.5. People Oriented Planning (POP) Framework

This framework is an adoption of the Harvard Analytical frame work for use in refugee's situations. The POP framework was designed to ensure equitable and efficient delivery of resources and services to female, male and children refugees. It aims to target aid more appropriately, and to reduce gender inequalities. The following three key factors are emphasized in POP;

Change: People displaced by conflict or other crises experience rapid and ongoing change in their lives. Crises can change the role of men and women.

Participation: Women, men and children is critical to the success of a program. Failure to involve refugees will ultimately lead to several consequences:

- ✓ Increasing lethargy on the part of refugees
- ✓ Cost increases
- ✓ Decrease in communication

The importance of analysis

Socio-economic and demographic analysis is essential when planning programs for refugee situations. The reason that it is essential to ensure socio-economic factors are included in initial planning is to avoid unintentionally depriving some refugees from the benefiting from programs because their responsibilities do not allow them the time or ability to participate.

Components of the framework

The framework has three main elements:

- Tool 1: The determinants analysis (also called the refugee population profile and context analysis);
- Tool 2: The activities analysis;
- Tool 3: The use and control of resources analysis

Tool 1: The determinants analysis (refugee population profile and context analysis)

Both the population profile and the social and cultural context are factors which influence the roles and responsibilities of women and men in a refugee situation. The population profile involves gathering demographic data on the refugees and the host population. Who are the refugees: Women, Men or Children? Assessing the refugee context helps to identify factors which shaped gender relations before the crises. These factors include community norms and values, community power structures, religious beliefs, economic and political factors.

Tool 2: The Activities Analysis

This tool helps to establish the tasks women and men do, as well as where and when they carry out those tasks. The division of labor changes in flight, therefore it is essential to know both what women and men did before, and what they do and can do now in the refugee situation. The activities analysis and population must be linked.

Tool 3: Use and Control of Resources Analysis

This tool is similar to the Harvard Tool 2 (Access and control tool). It helps to identify how resources are distributed and who has control over their use. Using this tool, it is possible to find out what resources were used and controlled by women and men before the crises and what resources do, they control and use in the refugee situation.

Potential limitation

It is difficult to use with groups that are not homogeneous. Such a situation would necessitate applying the frame work first to each group independently. The question of who has control in the refugee community is problematic because control over areas of social life resides with external actors. Finally it doesn't put sufficient emphasis on the long-term development of refugees.

4.6. The Social Relations Approach (SAR) Framework

The Social Relations Approach to gender and development planning is based on a socialist Feminist background: it was developed by Naila Kabeer at the Institute of Development Studies Sussex University, UK, in collaboration with policy-makers, academics, and activists. The SRA has been used by government departments and NGOs for planning programs in a number of countries. The SRA is intended to be a method of analyzing existing gender inequalities in the distribution of resources, responsibilities, and power, and for designing policies and programs which enable women to be agents of their own development. The framework uses concepts rather than tools to concentrate on the relationships between people and their relationships to resources and activities and how these are re-worked through institutions such as the state or the market.

The three essential components of the Social Relation Approach are:

- The goal of development as human well-being
- The concept of social relations
- Institutional analysis

Aims of the framework

- To analyze existing gender inequalities in the distribution of resources, responsibilities, and power
- To analyze relationships between people, their relationship to resources and activities, and how they are reworked through institutions
- To emphasize human well-being as the final goal of development.

The main concepts of the Social Relations Approach

Concept 1: Development as increasing human well-being: The definition of development in the Social Relations Approach is about increasing human well-being and not just about economic growth or increased productivity. The core elements of human well-being are survival, security and autonomy. Development interventions must be assessed on the extent to which they contribute to human well-being as well as what they contribute in terms of technical efficiency.

Concept 2: Social Relations in: This framework “social relations are understood as the way in which different groups of people are positioned in relation to resources”. Social relations determine people’s roles, responsibilities and claims, as well as the rights and control they have over their own lives and those of others. Social relations include gender relations, class, ethnicity and race. Social relations are not static; they can change over time and are influenced by changes at the macro level. The access people and groups have to material and intangible resources are also determined by social relations.

Concept 3: Institutional Analysis: The factors which produce gender inequalities are not found solely in the family but exist across a wide range of institutions, including the international community, the state, and the market place. An institution is defined as a framework of rules for achieving particular economic or social goals. Social difference and inequalities are created and perpetuated by institutions. Organizations are defined as the specific structural forms that institutions take. Gender-awareness necessitates an analysis of the way these institutions create and reproduce inequalities.

The Social Relations Approach identifies four key institutions

- The state
- The market,
- The community and
- The family/kinship.

Although institutions differ and vary across cultures they do have some features in common. All institutions have five distinct but inter-related elements of social relationships: rules, resources, people, activities, and power. These elements are critical to the analysis of social relations, and gender inequality.

The elements are:-

- **Rules:** How things get done
- **Activities:** What is done?
- **Resources:** What issued? What is produced?
- **People:** Who is in? Who is out? Who does what?
- **Power:** Who decides, and whose interests are served

Concept 4: Institutional gender policies: Gender policy categories depending on the extent to which they recognize and address gender issues.

Concept 5: Underlying and structural causes: When undertaking an analysis for the purpose of planning an intervention this framework examines the immediate, underlying, and structural factors which are responsible for the problems, and their effects on those involved.

Potential limitations

The analysis produced by using the Social Relations Approach can convey an impression of large institutions where change will be difficult. However, although this may be true; it can result in overlooking the potential for people to effect change.



Activity 8: Group Discussion on Social Relation Approach

Step 1: Divided Participant in to small group.

Step 2: Allow participant to discuss on the following questions?

- What is the role of development in order to increase human well-being in relation to social relations approach?
- The impact of social relation on gender equalities.
- What are institutions which affect gender equalities?
- The difference between Institutional gender aware policies and Gender blind policies.

Step 3: Clarify the questions to be discussed and one person to chair and another to report in plenary; and facilitate for they can hold discussions.

Step 4: Permit the groups to present their discussion points.

Step 5: Summarize the discussion within training note.

4.7. SWOT Analysis

This tool is designed to help people identify the internal Strengths and Weaknesses of their organization or group, in relation to the Opportunities and Threats presented in the external environment (SWOT). It is an effective method of identifying your organization's Strengths and Weaknesses, and to examine the Opportunities and Threats you face.

To carry out a SWOT Analysis writes down answers to the following then after organize the SWOT analysis in this manner:

| | |
|--|---|
| STRENGTHS <ul style="list-style-type: none">▪ <i>What are your advantages?</i>▪ <i>What do you do well?</i> | WEAKNESSES <ul style="list-style-type: none">▪ <i>What could be improved?</i>▪ <i>What is done badly?</i>▪ <i>What should be avoided?</i> |
| OPPORTUNITIES <ul style="list-style-type: none">▪ <i>Where are the good chances facing you?</i>▪ <i>What are the interesting trends?</i> | THREATS <ul style="list-style-type: none">▪ <i>What obstacles do you face?</i>▪ <i>What is your competition doing?</i>▪ <i>Are the required specifications for your job, products or services changing?</i>▪ <i>Is changing technology threatening your position?</i> |



Activity 9: Group Work and Discussion on SWOT Analysis

How do you proceed with SWOT Analysis if requested to come up with a five year gender strategic plan of an organization x?

Step 1: Divide participants into small groups.

Step 2: Let them analyze a hypothetical organization using the questions listed above.

Step 3: Organize their possible answers in the table under the four key terms (SWOT).

Step 4: Present and reflect their finding to other groups.

4.8. Force Field Analysis

Force Field Analysis is a tool used for analyzing complex problems and helping to identify solutions. From late 1940s when it was first used in social science research for analyzing group dynamics; it is based on the hypothesis that a given situation arises as a result of a number of balancing forces (or factors), some of which are constraining forces, resisting or blocking change, and which are driving forces, facilitating or promoting the process of change. Force Field Analysis is a method used to get a whole view of all the forces for or against a plan so that a decision can be made which takes into account all interests. This is a specialized method of weighing pros and cons.

Carrying Out a Force Field Analysis

- List all forces driving change in one column and all forces restraining change in another.
- Assign a score to each force, from 1 (weak) to 5 (strong)
- Draw a diagram showing the restraining and driving forces, and the size of the forces.
- Where you have already decided to design a project to achieve the desired change, force field analysis can help you to decide how to address obstacles.

Here you have two choices;

- ✓ To reduce the strength of the forces restraining the project
- ✓ To increase the strength of the forces driving the project

Example of Force-Field Analysis Diagram

Problem: Less than 5% of women entrepreneurs in a recently have applied to be connected to international export market.

Goal: An NGO aims to increase the number of women entrepreneur connected to international export market 40%inthenexttwoyears.

| Two years' time (Goal) | Driving forces | Constraining Forces |
|---|---|--|
| <ul style="list-style-type: none">▪ To increase the number of internationally connected women entrepreneur to 40% in the next two years | <ul style="list-style-type: none">▪ Government policy to promote export trade use▪ Active women entrepreneur accession▪ Increased income generation opportunities | <ul style="list-style-type: none">▪ Lack of information about benefits of export market▪ Low income▪ Low quality of products |

Gender Mainstreaming Training Manual



Chapter 4

Gender Audit

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Chapter Introduction

Women and men have different access to and control over resources and power distribution as well. They benefit in different ways from development programs and projects and other efforts. How programs and projects are designed is intricately linked to the gendered nature of the organization providing the assistance.

The Gender Audit is a self-assessment tool for identifying staff perceptions regarding how gender issues are addressed in programming and in the internal organizational systems and activities. It is also a process for creating ongoing gender action planning, and to identify challenges and opportunities for increasing gender skills and organizational equality.

Therefore, in order to mainstream gender in every sector effectively, each sector needs to undergo a gender audit in four areas: political will, technical capacity, organizational culture and accountability. In this chapter, trainees will learn about the process and techniques of gender audit in organizational and programmatic lines.

Contents

The chapter comprises the following sessions;

- Session One: Basic Concept of Gender Audit
- Session Two: Gender Audit Approaches
- Session Three: Gender Audit Process and Sampling Strategies
- Session Four: Gender Audit Tools and Analysis

Objectives

At the end of this chapter the participants will be able to:

- 🌀 Explain the basic notion and characteristics of a gender audit,
- 🌀 Understand the deliverables and approaches of gender audit, and
- 🌀 Comprehend the gender audit process and sampling strategies, and
- 🌀 Differentiate between the different tools for gender audit.

Chapter Duration

- 8 Hours

Methodology

- Lecture
- Questions
- Reflection
- Brainstorming
- Group Discussions
- Case story

Required Material

- LCD Projector
- Laptop Computer
- Flip Chart
- Markers
- Pens
- Note Book
- Colour Paper
- Handout
- Masking Tape
- Sticker Note
- Hard paper
- Case study

Session One: - Basic Concept of Gender Audit

| Session One | Basic Concept of Gender Audit |
|----------------------------|---|
| Duration | 180 minutes |
| Learning Objectives | <p>By the end of this session trainees will be able to:</p> <ul style="list-style-type: none"> ▪ Understand the meaning, objectives and importance Gender Audit, ▪ Articulate the scope of Gender audit, and ▪ Explain who will be involved in the gender audit processes and when gender audit will be conducted. |
| Content | <ul style="list-style-type: none"> ▪ Definitions of Gender Audit ▪ Objectives of Gender Audit ▪ Importance of Gender Audit ▪ Scope of Gender Audit ▪ Preparation for Gender Audit |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 1: Brainstorming on Gender Audit

Step 1 : Ask and Brainstorm trainees about;

- What do you understand by Gender Audit?
- What do think of the objectives and importance of Gender Audit?
- Have you ever been conducted a gender audit in your organization?

Step 2: Let trainees to reflect their point of view each other.

Step 4: Summarize the discussion using trainer's tips and note.

Trainer's Note

1. Basic Concepts of Gender Audit

1.1. Definition of Gender Audit

A Gender Audit is essentially a social inspection that assesses the extent to which gender equality is effectively institutionalized in the policies, programs, organizational structures and proceedings (including decision-making Processes) and in the corresponding budgets.

Gender audit is an important tool that provides a clear picture of an organization's gap and strength in addressing gender concerns. It establishes accountability for gender equality by enhancing commitments for gender mainstreaming.

Gender audit is one aspect of gender mainstreaming; it analyzes the mainstream from the point of view of effects on the status of women and men. It serves as a planning tool; it shows where improvements can be made in mainstreaming gender in policies, regulations and programs as well as in institutional operations of an organization.

Gender Audit:

- Assesses the progress made in gender mainstreaming;
- Considers whether internal practices and related support systems for gender mainstreaming are effective and reinforce and whether they are being followed;
- Documents good practices towards the achievement of gender equality;
- Establishes a baseline and Identifies critical gaps and challenges; and
- Recommends new strategies and ways of addressing gender gaps identified

Gender audit also enables organizations/institutions to identify the impact of gender relations on their institutional culture, processes, programs and organizational performance. When the specific patterns of gender relations in an organization are uncovered, it becomes possible to work within the organization to change the unequal patterns and to reinforce the equalizing ones, making the organization more gender responsive.

1.2. Objectives of Gender Audit

Gender audit aims to see whether the policies, practices, systems, procedures, culture and resources are being used in the most effective way to deliver the organization's commitments to gender equality.

The main objectives of undertaking gender audit are:

- To generate understanding of the extent to which gender mainstreaming has been internalized and acted upon by staff;
- To assess the extent of gender mainstreaming in terms of the development and delivery of gender sensitive products and services;
- To identify and share information on mechanisms, practices and attitudes that have made a positive contribution to mainstreaming gender in an organization;
- To assess the level of resources allocated and spent on gender mainstreaming and gender activities;
- To examine the extent to which human resource policies are gender-sensitive;
- To examine the staff sex balance at different levels of an organization;
- To set up the initial baseline of performance on gender mainstreaming in an organization with a view to introducing an ongoing process of benchmarking to measure progress in promoting gender equality;
- To measure progress in implementing action plans on gender mainstreaming and recommend revisions as needed; and
- To identify room for improvement and suggest possible strategies to better implement the action plan

1.3. Importance of Gender Audit

Gender audit enables every sector to systematically take stock of and address the status of gender equality in all aspects of its activities. Specifically;

- Assess the policies, procedures and planning, implementation, monitoring and evaluation process of the organization from gender perspectives,
- Identify areas of gaps and achievements in gender mainstreaming,
- Identify good practices and areas of improvements that can be used as a foundation for gender action planning,

- Identify potentials and challenges, to make informed decisions for mainstreaming gender, and
- Helps to raise awareness on gender concerns and enhance skills of employees in gender mainstreaming.

In short, conducting a gender audit is important to ascertain the commitment of every sector/organization for mainstreaming gender in all areas and at all levels of its activity. It is also crucial to create awareness and knowledge of employees about gender issues which in turn helps them address gender concerns in their duties. It is believed that gender audit helps organizations to become more effective in institutionalizing gender mainstreaming.



Activity 2: Experience Sharing on the Scope of Gender Audit

Step 1: Considering organizations that have undertaken gender audit in the previous session;

Step 2: The trainer will ask the participants to share their experiences of gender audit with regard to its scope

Step 3: Let them discuss and reflect their point of view.

Step 4: Following the discussion through experience sharing, the trainer will conclude by using trainer's tips and note.

Trainer's Note

1.4. Scope of Gender Audit

Scope of a gender audit depends on the nature, structure and objective of an organization. However, gender audit focuses on two areas, at program and organizational levels. At program level it deals with assessing the policies, program design, implementation and monitoring and evaluation processes of the organization with a view to ascertain equitable service provision for women and men.

At organizational level it assess the organizational culture, the gender balance in staffing, human resource development plan, availability of adequate financial resources for gender related activities, and gender sensitivity of publications and other means of communications.



Activity 3: Group Discussion on Preparation for Gender Audit

Step 1: The trainer will form a group of 7-10 members and let them discuss the following questions in groups;

- Who do you think should be involved in the gender audit? Why?
- When do you think gender audit should be undertaken?

Step 2: Let the groups to present their discussion results to the plenary.

Step 3: Summarizes the discussion using trainer's note.

Trainer's Note

1.5. Preparation for Gender Audit

Who is Involved in a Gender Audit?

Gender audit is a participatory process of self-assessment that demands a clear understanding of gender concepts and a skill in mainstreaming. It is important to understand that gender audit is a challenging process of learning and change. It is challenging, as it involves new insight on gender and development that demands policy, structural and cultural changes in organizations and it is a learning process as it engages all staff in the organization.

The audit process can be led by a consultant or by a gender expert within the organization. However, in both cases it should be done in a team to promote learning. Gender audit is an intensive and time-consuming exercise, it needs commitment and determination. It also requires knowledge and skill in gender, technical knowledge on the organization's programs and over all objectives of the organization as well as skills in feminist research.

It is advisable that team members volunteer to join the team rather than be assigned in order to build strong team spirit. The team members should be selected from the different sections of the organization for filling gaps in technical knowledge. It is also

worth to note that the team composition should consider gender balance and other grounds/factors of diversity.

In addition, for the gender audit to be successful, all team members, though had training in gender and technical skill, should be given intensive training on gender analysis, gender mainstreaming, gender auditing and research methodologies before starting the work.

Gender audit, as with most organizational initiatives, require commitment from senior management. Nevertheless, the engagement of all personnel in an institution is equally important. An inclusive process ensures a sense of ownership, accountability and responsibility for the results of the audit process.

For the team to be effective in its role, top management need to:

- Demonstrate commitment to the entire process, and take full ownership of the results
- Give recognition and authorization for the team's work
- Provide the team with financial resources
- Access to physical resources such as meeting rooms, copying facilities and documents
- Allocate adequate time based on the volume and scope of the work

There are different advantages and disadvantages for gender audit conducted either by an internal team or external consultants.

| | Advantages | Disadvantages |
|----------------------------|--|--|
| Internal Audit Team | <ul style="list-style-type: none"> May be less expensive. Knowledge of internal structure, procedures and hierarchies. May be taken more seriously, depending upon position in the institution. | <ul style="list-style-type: none"> Lack of independence. Potential consequences for staff in assessment team in case of criticism of behavior. Potential barriers due to hierarchies Lack of experience in conducting gender audits. |
| External Audit Team | <ul style="list-style-type: none"> More independent point of view, potentially broader perspective. No fear of consequences when critical about internal processes. Expertise and experience in conducting gender audits. | <ul style="list-style-type: none"> Lack of understanding of how specific institution or organization works. Potentially difficulty in enlisting staff cooperation and ownership of the process. Lack of a common vision, goal and interpretation of outcomes. |

The coordination and relationship between the gender audit team and the organization's staff is crucial in both cases. Furthermore, external consultants also depend on the cooperation and political will from senior management. Therefore, the terms of reference for gender audit should be drawn up in coordination with top management of the organization and the unit/focal person that leads the audit process.

How Long Does A Gender Audit Take?

Time line for gender audit depends on the scope of the audit and the resources available to undertake it. In some documents there is a suggestion of one and half months to a year. However, to determine the time line, it is important to consider the structure, number of employees and the geographical location.

It is also important to consider the culture of the institution and keeping in mind that there may be an expected event that could affect the process. Putting a time frame for each step in the process is also vital. This will alert the team in meeting the deadlines.

When to Undertake a Gender Audit?

Gender Audit is an ongoing process of review and improvement in the organization's capacity to deliver programs and strategies that will lead to gender equality. Gender audit can be done before reform processes and gender mainstreaming initiatives are formulated or implemented. It can be undertaken at the beginning of the process in order to develop an accurate baseline for further evaluation and monitoring. Gender audit can, therefore, serve as both a starting point and an evaluation and self-assessment of ongoing gender mainstreaming activities.

Gender Auditing can also be a useful tool in the organization's performance monitoring framework. Most organizations are required to review their programs annually, and present their proposed work plan for the following year to their headquarters. The results of the first Gender Audit will become the baseline against which to measure progress. Moreover, the gender audit action plan establishes actions to be taken in the following months or years. It can be incorporated into the organization's annual work plans, and its longer-term country strategy.

Session Two: - Gender Audit Approaches

| Session Two | Gender Audit Approaches |
|----------------------------|---|
| Duration | 60 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none"> Identify and describe different approaches in gender auditing |
| Content | <ul style="list-style-type: none"> Approaches and Deliverable of Gender Audit Interaction Gender Audit Approach ILO Participatory Gender Audit Methodology |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 4: Group Discussion on Gender Audit Approaches

Step 1: The trainer will form a group and let them discuss the following question in groups;

- Who do you think of similarities and differences of gender audit approaches?

Step 2: Let the groups to present their discussion results to the plenary.

Step 3: Summarizes the discussion using trainer's tips and note.



Trainer's Tips

The trainer is advised to raise issues of concern and have an open discussion on common points in relation to deliverables and types of gender audits. It's important to underline the goal of the different types of gender audits is the same; to better mainstream gender in the institution/organization. It's also important to emphasize that trainees may choose one or other or mix the different types of gender audits.

Trainer's Note

2. Gender Audit Approaches

2.1. Approaches and Deliverable of Gender Audit

Approaches of Gender Audit

There are different approaches in gender auditing that are developed by different organizations. However, in this module the Interaction and ILO participatory approaches are taken as appropriate approaches for conducting gender audit to the Ethiopian context.

Interaction approach is preferred because it treats both programming and organizational issues equally, and above all it gives the opportunity to triangulate the findings from the organization with the stakeholders. Further, it examines the entire program cycle: program design and planning, implementation, capacity for mainstreaming, and monitoring and evaluation and furthermore it allows gathering the views of partners and beneficiaries.

ILO participatory gender audit approach is considered as it sharpens organizational learning at work unit and individual level through processes of team-building, information sharing and reflection.

Therefore, the Interaction and ILO participatory gender audit process will be discussed in the following session. However, the trainer has to familiarize her/himself with the different approaches to explain the basic principles and differences of the approaches listed below.

- Interaction Gender Audit
- ILO Participatory Gender Audit
- Novib Gender and Diversity Audit
- Oxfam Gender Mapping
- Juliet Hunt Gender and Development Self-Assessment Tool
- ACCORD Gender Audit

Deliverables of Gender Audit

The main outcome of the gender audit is a report that includes recommendations for performance improvement and concrete actions for follow-up by the audited organization. Moreover, the audit methodology is very useful and can be used by facilitators in other settings to promote reflection analysis of experiences, and learning that initiates change. The participatory approach ensures how to critically assess their attitudes and practices and to develop ideas on improving their performance on gender equality.

Moreover, gender mainstreaming strategy and action plan, framework for accountability, organizational and/or programming guidelines and tools, and staff training are the additional outcomes of a gender audit.

2.2. Interaction Gender Audit Approach

Interaction auditing tool was developed by Commission for Advancement of Women (CAW) for assessing gender mainstreaming status of US-based NGO's in 2000. A fundamental premise to develop this auditing tool is for gender equity to be integrated in programming and organizational practices to bring about sustainable organizational change.

Interaction's gender audit is a process for organizational assessment and a tool for action planning. The Interaction audit process helps to identify organizational strengths and challenges towards integrating gender in the organization's systems and operations and in programs and projects. Gender audit process requires commitment on the part of top management, senior staff and the ability of a gender focal points or gender teams to implement the audit process in the organization.

The Interaction audit tool uses a framework called the ***Gender Integration Framework (GIF)***, which suggests that transformation can only occur when four organizational dimensions are ready for gender integration. These four elements are political will, technical capacity, accountability, and organizational culture which are symbolized by a tree. This framework shows how political will is the root that allows and

encourages gender equality. It further illustrates the other enabling elements grow and branch out from the root, political will.

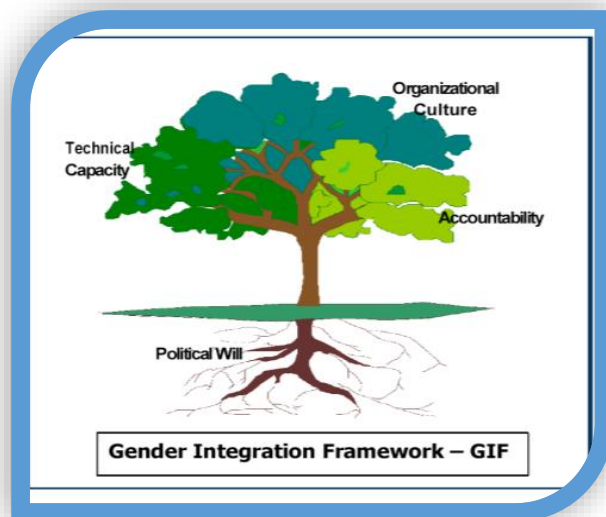
“An organization with strong political will, like a tree with strong roots, can support the development of three vital branches: technical capacity, accountability, and a positive organizational culture”

Political Will: the ways in which leaders use their position of power to communicate and demonstrate their support, leadership, enthusiasm for and commitment to working toward gender equality in the organization.

Technical Capacity: Level of ability, qualifications and skills individuals in an organization need to carry out the practical aspects of gender integration for enhanced program quality, and level of gender equitable organizational processes.

Organizational Culture: Norms, customs, beliefs and codes of behavior in an organization that support or undermine gender equality: how people relate; what are seen as acceptable ideas; how people are expected to behave; and what behaviors are rewarded.

Accountability: requires mechanisms by which an organization can determine the extent to which it is “walking the talk” in terms of mainstreaming gender equality in its programs and organizational structures.



Interaction gender audit tool is a two-stage process

The first stage is collection of data through the Gender Audit questionnaire. The questionnaire was designed to help organizations assess the range of understanding, attitudes, perceptions and reported behavior among staff in their own organization.

The second stage of Interaction gender audit process has three phases: discussion, analysis and planning. In the second phase the results of the questionnaire will be presented to the staff of the organization to explore the findings and trends in more depth. Interaction gender audit process has two main focus areas: program and internal organizational processes.

i. Programming:

- Program Planning and Design
- Program Implementation
- Technical Expertise
- Monitoring and Evaluation
- Partner Organizations/Beneficiaries

ii. Organizational:

- Gender Policies Staffing
- Human Resources
- Advocacy, Marketing, Communications
- Financial Resources
- Organizational Culture

2.3. ILO Participatory Gender Audit Methodology

Participatory Gender Audit Methodology (PGA) has four fundamental pillars, i.e. the Gender and Development Approach (GAD), the Qualitative Self-Assessment (QSA), the Adult Learning Cycle (ADL), and the Learning Organization (LO).

An innovative approach in the ILO participatory gender audits is the use of participatory workshop exercises that encourage optimal interaction and dialogue among the trainees. The methodological underpinnings of the participatory exercises comprise four fundamental pillars:

Pillar 1: The Gender and Development Approach (GAD)

The GAD emerged in the 1980s focusing on inequality between men and women. The term “gender” was coined and used as an analytical tool as awareness increased of the inequalities arising from institutional structures that favored men.

GAD focuses on:

- Women as an isolated and homogeneous group; and
- The roles and needs of both men and women.

Given that women are usually disadvantaged socially and economically when compared to men, the promotion of gender equality implies explicit attention to women’s needs, interests and perspectives. The objective then is the advancement of the status of women in society, with gender equality as the ultimate goal. The recognition of the need for proper planning in resolving gender inequality has resulted in more attention being given to the organizational issues involved in changing relations. A number of workshop exercises are designed to garner information on organizational culture.

Pillar 2: The Qualitative Self-Assessment (QSA)

Any change, including organizational change, requires that the focus be put on tangible as well as intangible factors. Facts, as well as the interpretation of facts, have to be taken into account, balancing both objective data and subjective perceptions. There are always differences between the way people act and the way they think they act, just as there are differences between the way organizations act and the way they think they act. These different perspectives seem especially relevant when considering gender equality and women’s empowerment issues.

QSA allows work unit staff to ask questions such as;

- Why are things the way they are?
- How did we get to where we are?
- Why do we act the way we do?
- What are the forces of change?
- Where are the forces that make change possible?
- Are we doing the right things?
- Are we doing the right things in the right way?

Pillar 3: The Adult Learning Cycle (ALC)

In organizational settings, as in other areas of life, practical, problem-oriented learning usually takes place “on the job” and is a direct result of concrete experience. However, transposed to organizations, the reality of gender mainstreaming does not always match the organization’s policy on gender mainstreaming. The audit workshops aim to discover the extent of this lacuna and to foster a learning process that leads work units to redress the gap. The ALC is used as a guide in selecting the methods or exercises for the design and delivery of audit workshops.

The methodology is a good example of problem-oriented learning in relation to gender audit workshops for the following reasons:

- Through reflection and exchange, trainees are able to translate their own experiences into general and abstract conclusions relevant to their work unit and to the work unit as a whole;
- Turn them into proposals for change through experimentation. The adult learning cycle is particularly applicable to gender audit workshops. It enables trainees to link learning to effective changes in the way they work.

Pillar 4: The Learning Organization (LO) approach

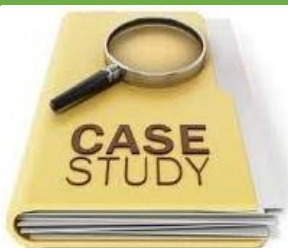
Learning and change in organizations take place at the level of;

- The individual;
- The work units; and
- The organization.

Organizations set the agenda for learning through their objectives, vision and mandates. Actual learning can take place and be linked from the individuals to the work unit and from the work unit to higher organizational levels. If individuals and work units do not learn, the organization may not be able to adapt to the multiple demands that a rapidly changing environment places on it. The gender audit involves assessing, learning and changing at all three of the above levels. In general the ILO approach focuses both on organizational objectives and on the changes required of individuals working in the organization.

Session Three: - Gender Audit Process and Sampling Strategies

| | |
|----------------------------|--|
| Session Three | Gender Audit Process and Sampling Strategies |
| Duration | 120 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none"> ▪ Explain the steps in the gender audit process, ▪ Identify the different sampling techniques. |
| Content | <ul style="list-style-type: none"> ▪ Steps of the Gender Audit Process ▪ Sampling Strategies |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 5: Case Study on Steps of Gender Audit

Step 1: The trainer will form a group of 7-10 members.

Step 2: Let the group to discuss the case study given below.

Ms. Amerti led the Way

Ms. Amerti, who is a gender focal person in her organization, initiated the undertaking of a gender audit prior to the development of a five year strategic plan in the organization. In order to move forward, she did secure senior leadership buy-in and support for conducting the gender audit process. This has been very important as it is the senior management that did provide the necessary verbal and communication messages promoting the importance of the process and urging involvement of staff in it. Following that, the gender audit team prepared a gender audit questionnaire with four key components (political will, technical capacity, organizational culture, and accountability). After administering the survey, the team analyzed the data and presented the results to staff through an office newsletter and a power point presentation at staff meeting.

After receiving feedback from the staff on the results of the survey; the audit team conducted series of focus group discussions with staff. The main purpose for the FGDs was to clarify

survey results, gain additional insights into the results, and to explore how staff envisions an organization that is gender integrated. Following that, FGD results were compiled and yield specific action items which became the Gender Plan of Action. The team drafted a gender plan of action which comprises action items, targets, initiatives and strategies for ways to better integrate gender equality throughout the organization. The action plan also included staff recommendations from each stage of the audit.

Step 3: Upon completion of the discussion on the case study provided, group leaders will make a presentation on what they understand as steps of gender audit.

Step 4: The trainer sums up the discussion using trainer's tips note.

Trainer's Note

3. Gender Audit Process and Sampling Strategies

The gender audit process is a participatory process that is intended to accommodate the voices of staff at all levels, beneficiaries/clients, and stakeholders. However, it might not be possible to gather data from all of the above sources. Therefore, it will be necessary to take appropriate sample from each category for convenience particularly for big organizations.

3.1. Steps of Gender Audit Process

The gender audit process has the following four steps:

Step 1: Preparing the Organization to carry out a gender audit

The Gender Audit process is intended to be conducted in both a systematic and participatory manner and should involve as many staff as possible.

Voices that represent all levels and types of positions within the organization should be represented.

- Organizing the gender auditing team with fair representation of work units and gender composition and other diversity.

- Provide training for the team on the concept and processes of gender auditing and research methodology
- Develop an action plan to keep the process in track and to communicate with the staff at every step of the audit process
- The Gender Audit team start the audit process by reviewing documents such as: policy, proclamations, strategic plan, annual plans and performance report, publications and other archives
- Organizing a briefing session to introduce the concept and the need for the gender audit for the staff and stakeholders.

Step 2: Data collection through Survey questionnaire

The second step of the Gender Audit process is to conduct a survey using the Gender Audit questionnaire. The questionnaire should be designed to help organizations assess the range of understanding, attitudes, perceptions and reported behavior among staff in their own organization. Responses to the questionnaire serve as a baseline of staff perceptions on the status of gender equality in the organization's programs and processes.

There are two survey instruments to choose from: - a long version or a short version. The longer questionnaire seeks to discover what staff thinks the organization is doing on the two dimensions of organizational functioning: Programming or, what you do primarily in the field; and, Operations or what you do inside the organization.

The shorter questionnaire template should be designed to fit your organizational needs. This shorter version should yield results that can be analyzed using four dimensions: Political Will, Technical Capacity, Organizational Culture, and Accountability.

Step 3: Conducting Interviews and Focus Group discussion

The third step of the Gender Audit process is collecting qualitative data through interview, focus group discussion and case study. These conversations provide the bases for identifying actions that need to be taken to promote gender equality. Each interview and focus group conversation begins with a short briefing of the concept and significance of gender audit guided by key guiding questions you want the individual and the group to

explore. Objective of the focus group conversations is to gain deeper insights into the survey findings and to learn more about trends in the data.

Step 4: Data Analysis and Drawing Conclusions

The quantitative data collected through the questionnaire can be analyzed using statistical analysis software like SPSS for professional social sciences (SPSS) or Excel. The qualitative data gathered through interview, focus group discussion and case study will be analyzed thematically. There are different forms of survey data analysis; the team has to select among the many that fits the specific sector. The three most commonly used ways are univariate analysis, composite measure analysis and bi variate analysis.

Step 5: Preparation of Gender Audit Action Plan

The desired outcome of the Gender Audit process is shared ownership to move toward a gender-responsive organization and the Gender Action Plan is used to include ideas and suggestions from staff. The gender action plan must include clear and measurable goals for gender equality, including targets, as well as concrete strategies to reach these goals within a specific timeframe.

3.2. Sampling Strategy

What is a Sampling Strategy?

In order to generalize findings for the organization/institution there is a need for samples to be representative. There is recognition that generalization requires both appropriate and representative sampling, and of course the same is true in selecting the analysis samples. Sampling is a process that is always strategic, and sometimes mathematical. In an analysis with goals of general ability, sampling will involve using the most practical procedures possible for gathering a sample that best ‘represents’ a large population.

Regardless of any quest for representativeness, the process of sampling will still involve: *naming your population; determining sample size; and employing an appropriate sampling strategy.*

Determining Sample Size

Sample size depends on the nature of the analysis and the shape and form of data you intend to collect. The best way to come up with a figure is to consider your goals (general

ability; the parameters of your population (how large it might be and how easy to identify elements); and the type of data you plan to collect.

Working with Qualitative Data: In collection of qualitative data, the goal is often rich understanding that may come from the few, rather than the many. Such data are not so much dependent on representativeness or sample size as they are on the ability of the one making the analysis to argue the ‘relativeness’ of any sample to a broader context. In some cases, some may gather qualitative data and represent a defined population (organization or else staff) with some level of confidence.

Working with quantitative data: To work with quantified data, the basic rule is to attempt to get as large a sample as possible to make it more likely to be representative, and therefore. As minimum requirements, these are often determined by the anticipated level of statistical analysis.

Sampling for Gender Audit

Depending on the size of the organization, the audit may take one of three shapes. For small organizations with less than 50 staff, you should involve all staff in the survey and focus groups. For medium size organizations of 50 to 300 staff you can select a sample of trainees who come from all teams within the organization. For large organizations of over 300 staff and multiple units you may wish to conduct the audit in individual offices (e.g., federal ministry, regional bureaus etc.).

Sampling Strategies for Survey

The information you obtain from the survey responses should come from staff who represent a wide cross-section of your organization, from all levels, departments, positions, etc. For some organizations, this will require you to select a sample of individuals to participate, while in other organizations, all staff will participate.

Depending on the size of the organization, the following strategies are recommended to select which staff completes the questionnaire.

- For small to medium organizations or small offices (less than 100 staff): you should have all staff complete the questionnaire;
- For medium to large organizations: you should choose a representative sample of at least 25-30% of your staff. You should ensure a proportional number of

respondents from each unit or department including regional/ Woreda level bureaus (if applicable);

- *Organizations with a large number of non-program/support staff:* you may wish to administer the Program Section of the questionnaire only to program staff, especially if support staffs are unfamiliar with the specific details of the organization's programs and projects. In this case, use the following guide:
- *Support/non-program staff:* complete the Organization Section of the questionnaire only.
- *Program/professional staff:* complete the entire questionnaire.

Session Four: - Gender Audit Tools and Analysis

| | |
|----------------------------|---|
| Session Four | Gender Audit Tools and Analysis |
| Duration | 120 minutes |
| Learning Objectives | <p>By the end of this session trainees will be able to Identify:</p> <ul style="list-style-type: none"> ▪ Distinguish between the different tools for gender audit, ▪ Adapt the tools appropriate for the gender audit they undertake. |
| Content | <ul style="list-style-type: none"> ▪ Tools of Data Collection <ul style="list-style-type: none"> ✓ Desk Review, ✓ Survey, ✓ Interviews, ✓ Focus Group Discussions, ✓ Workshop, ✓ Observations ✓ Analysis and ✓ Final Report |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |

Trainer's Note

4. Gender Audit Tools and Analysis

4.1. Tools of Data Collection

Desk Review

Gender audit begins with a desk review of documents such as policy, proclamations, strategic and annual plans, reports, minutes, publications etc. The purpose of desk review is threefold: it provides quantitative and verifiable information to be used as a baseline data and to complement the results from other data collection methods; the information that it generates feeds into the participatory process as material for discussion and appraisal by trainees; and it establishes a bench mark for gender mainstreaming in future documents.

Survey

Survey questionnaire is one of the most common tools in gender audit. This is largely because it is an efficient way of collecting large amounts of data and is flexible in the sense that a large number of issues can be included in the same questionnaire.

While developing a questionnaire avoiding double negatives, ambiguous or unclear questions, and double questions, keeping questionnaires brief and being culturally sensitive can help minimize bias.

Interviews

In principle, an interview schedule includes all the work unit staff members so that they feel that they have had a chance to express themselves. However, in practice this may not always be possible if there are only a limited number of facilitators available. In such cases, a selection of staff member is made for the interviews. Other staff members should be given the opportunity to be interviewed if they feel they have an important contribution to make. In certain cases, officials may not be available for interviews because of their absence on important missions or during emergencies, and these exceptions need to be taken into consideration as well.

The interview schedule needs to be setup beforehand in consultation with staff of the organization and also with partner organizations. Staff of the organization, partners and beneficiaries should get the opportunity to express them.

Focus Group Discussions

Focus groups are a valuable way to gain additional insights and information about the beliefs and perceptions of staff in your organization regarding gender equality and the status of gender mainstreaming. The aim of these conversations is to uncover additional information, triangulate the survey results and to discover trainees' vision of a gender-equitable organization.

The following are some important points that the auditing team has to decide on prior to conducting the focus groups,

- How many focus groups to hold depending on the size of staff in the organization and its clients
- Who will facilitate the focus group discussion; those with good communication skill should be selected (two discussion leaders, recommended).
- Who will take notes, good note-takers among team members should be selected and a clear instruction has to be given of what to look for and how to take notes, (two note takers, recommended).

Workshop

The workshop methods may include Venn diagrams, perception of achievement, historical timeline, interviews and gender quality tests.

The areas of discussion include:

- Defining concepts of gender
- Use of framework for gender analysis
- Historical timeline
- SWOT analysis of the organization
- Development of action plan by trainees
- Presentation of the gender audit questionnaire result

After the analysis is done, the result should be presented back to the staff of the organization in a workshop. It is important for an organization to be aware.

Observation

Observation is one of the methods of data collection that relies on a researcher's ability to gather data through his or her senses. It is highly subjective as it depends on personal ability and judgment of the individual. It is also highly time consuming, require a lot of training of observers and can be biased because the observer will inevitably influence the behaviour of those observed.

Systematic observation entails developing observation instruments that can have a variety of forms. Descriptions of the observation give detailed information but are hard to code. Counts of particular behaviours are highly reliable but limit us in what we can observe.

4.2. Gender Audit Analysis

a. Analysing Desk Review Results:

This allows the team to tabulate information from all four categories and to make qualitative judgments in two areas:

- The organization/department gender-specific documents; and
- The availability and usage of documents.

b. Analysing Survey Questionnaire

To analyse results of the short questionnaire a scoring sheet is provided and an excel spreadsheet format for inputting results. You can conduct all types of analysis suggested there except programming and operations dimensions composite measures.

c. Analyzing Results of Focus Group Discussions

Follow this procedure for each focus group question: Read through all the answers to a question (from all the focus group transcripts), looking for patterns and similarities.

- Group the answers into key points, keeping a list as you go. If a key point is repeated, place a tally mark next to that point. Continue listing key points until every answer has been accounted for.
- Write a paragraph for the focus group question, summarizing the overall response to that question. Things to consider as you decide what to include in the summary:

- ✓ *Frequency* - how many times the key point was made by different people
- ✓ *Specificity* - how detailed particular responses were
- ✓ *Emotions* - how much emotion or intensity was expressed in a answer?
- Select a few quotes from the transcript to illustrate and provide summary insights.

Final Report

Model Gender Audit Report

Table of contents

Executive Summary (highlights main points of report including background, methodology and process, and main conclusions and recommendations)

Acknowledgements (people instrumental in promoting or organizing the audit within the work unit or office and carrying it out)

List of abbreviations and acronyms

Introduction (purpose of the audit and report, background to audit of the work unit or office including dates and process, and members of facilitation team)

Methodology

Main Finding

Conclusions and recommendations in the key criteria areas:

- Gender issues in the context of the work unit and existing gender expertise, competence and capacity building.
- Gender issues in work unit's objectives, programming and implementation cycles, and choice of partner organizations.
- Information and knowledge management within the work unit, and gender equality policy as reflected in work unit's products and public image.
- Staffing and human resources, decision-making and organizational culture.
- Work unit's perception of achievement of gender equality.

Report on feedback session

Good practices

Lessons learned from the gender audit process

Annexes (including program of work unit audit; list of workshops, sessions, trainees and facilitation program; list of documents reviewed; and, if available, historical timeline of gender related activities)

Gender Mainstreaming Training Manual



Chapter 5



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Chapter Introduction

A Gender-Responsive Budget is a budget that works for everyone (women and men, girls and boys) by ensuring gender-equitable distribution of resources and by contributing to equal opportunities for all. Gender-responsive budgeting is essential both for gender justice and for fiscal justice. It involves analyzing government budgets for their effect on genders and the norms and roles associated with them. It also involves transforming these budgets to ensure that gender equality commitments are realized.

In this chapter, trainees will learn about the concept, objective, importance and tools of gender budgeting.

Contents

The chapter is comprises the following sessions;

- Session One: Concept of Gender-Responsive Budgeting
- Session Two: Tools and Steps of Gender Budgeting

Objectives

This chapter clarifies the origin, nature, advantages, objectives and steps of Gender Budgeting.

At the completion of this chapter the participants will be able to:

- 🌀 Explain the basic Concept of a Gender-Responsive Budgeting
- 🌀 Examine the tools and steps of Gender-Responsive Budgeting

Chapter Duration

- 2 Hours

Methodology

- Lecture
- Questions
- Reflection
- Brainstorming
- Group Discussions

Required Material

- | | |
|-------------------|----------------|
| ▪ LCD Projector | ▪ Colour Paper |
| ▪ Laptop Computer | ▪ Handout |
| ▪ Flip Chart | ▪ Masking Tape |
| ▪ Markers | ▪ Sticker Note |
| ▪ Pens | ▪ Hard paper |
| ▪ Note Book | ▪ Case Studies |

Session One: - Concept of Gender-Responsive Budgeting

| | |
|----------------------------|--|
| Session One | Concept of Gender-Responsive Budgeting |
| Duration | 60 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none">▪ Define the concept of Gender-Responsive Budgeting,▪ Explain the objective of Gender-Responsive Budget. |
| Content | <ul style="list-style-type: none">▪ Definition of Gender-Responsive Budgeting▪ Purposes of Gender-Responsive Budgeting▪ Importance Gender-Responsive Budgeting |
| Methodology | Lecture, Presentation, Brainstorming, Group Discussion and Reflection |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 1: Brainstorming on Gender Budgeting

Step 1: The trainer will brainstorm with the trainees on the following questions,

- What do you understand about the meaning, objectives and importance of gender budgeting?

Step 2: Let trainees to discuss and reflect their point of view.

Step 3: After the brainstorming, the trainer will summarize the discussion using trainer's tips and note.

Trainer's Note

1. Concept of Gender-Responsive Budgeting

1.1. Definition of Gender-Responsive Budgeting

Budgets are the most important policy tools available to a government and reflect its political priorities. Although the numbers and figures compiled in the budget documents might seem gender-neutral, empirical findings show that expenditure patterns and the way that

government raises revenue have a different impact on women and girls as compared to men and boys, often to the detriment of the former.

Gender Budgeting is part of the gender mainstreaming strategy. It focuses on a gender-based analysis and an equality-oriented evaluation of the distribution of resources. These resources are mainly money, time as well as paid and/or unpaid work. Gender budgeting seeks to achieve a gender-equal distribution of resources.

Gender Responsive Budgeting is an approach designed to mainstream the gender dimension in to all stages of the budget cycle. In general, gender responsive budgeting aims at analyzing the different impacts of a state's national and local expenditure as well as revenue policy on women and girls, and on men and boys, respectively. In addition to the impact analysis, gender responsive budgeting comprises making proposals to reprioritize expenditures and revenues, taking into account the different needs and priorities of women and men.

The Gender Responsive Budgeting process aims at producing gender responsive budgets. These budgets are not separate ones for women, but rather government budgets that are planned, approved, executed, monitored and audited in a gender-sensitive way.

1.2. Purposes of Gender-Responsive Budgeting

At its core, gender budgeting is a feminist policy with a primary goal of re-orienting the allocation of public resources, advocating for an advanced decision-making role for women in important issues, and securing equity in the distribution of resources between men and women.

- To analyse the (national) budget from a gender perspective (Gender Budget Analysis)
- To determine how revenue and expenditure affect women, men, girls and boys – who benefits from budgetary decisions and who does not? And
- To develop starting points for a gender-equal restructuring of the (national) budget and to effect changes in the fiscal policy priorities.

1.3. Importance of Gender Responsive Budgeting

✓ ***Monitoring of the achievement of policy goals***

Gender responsive budgeting provides a tool for monitoring the extent to which policy goals have been achieved in a gender aware manner.

✓ ***Alleviating poverty more effectively***

Although the available statistical data on income poverty cannot provide incontrovertible evidence that women are always more affected by income poverty than men, it is widely acknowledged that women fare worse than men with respect to social indicators; that women and men experience poverty differently; and that both face different constraints to overcome poverty. Women are also more affected by time poverty than men. If women's needs are not taken into account on an equal term, there is the risk that poverty reduction policies will fail.

✓ ***Enhancing economic efficiency***

Several studies have shown that there is a positive correlation between diminishing gender inequality and higher growth rates. Women's productivity increases disproportionately if their access to information, credit, extension services, inputs and markets is enhanced and if their time burden is reduced through, for example, investment in labor-saving infrastructure.

✓ ***Achieving gender equity/equality***

Achieving gender equity requires equality of outcomes for women and men. This implies their cognition of the different needs, preferences and interests that affect the way women and men benefit from the same policies.

✓ ***Advancement towards the realization of women's rights***

Gender responsive budgeting seeks to measure the gaps between policy commitments with respect to human rights and women's rights instruments (including the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), the adequacy of resource allocation, and the outcomes of policies.

✓ ***Achieving good governance***

The process of improving the delivery of goods and services to women, men, girls and boys in a fair, just, and responsible way has to be considered as an integral part of the definition of good governance. Good governance requires a participatory approach to the policy

making process, so that the different perspectives of different groups of citizens, including women, are represented.

✓ ***Enhancing accountability and transparency***

Gender responsive budgeting is a powerful tool for highlighting gaps between international commitments (such as those established at the Fourth World Conference on Women in Beijing in 1995, as well as in national policy documents), and the amount of public spending earmarked for the achievement of gender-specific benchmarks and targets. Gender responsive budgeting necessitates the availability of sex-disaggregated data plus access to program information. By tracking how allocated money is spent, gender responsive budgeting increases both accountability and transparency.

Session Two: - Tools and Steps of Gender-Responsive Budgeting

| | |
|----------------------------|---|
| Session One | Tools and Steps of Gender-Responsive Budgeting |
| Duration | 90 minutes |
| Learning Objectives | <p>At the end of this session trainees will be able to:</p> <ul style="list-style-type: none"> ▪ Clarify the tools of Gender Responsive Budgeting ▪ Explain the steps of Gender Responsive Budgeting ▪ realize the challenges and recommendations of Gender-Responsive Budgeting |
| Content | <ul style="list-style-type: none"> ▪ Gender-Responsive Budgeting Tools ▪ Steps of Gender-Responsive Budgeting ▪ Challenges in Gender-Responsive Budgeting ▪ Recommendations for Gender-Responsive Budgeting Good Practice |
| Methodology | Lecture, Reflections, Group Discussions and Presentations |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 2: Brainstorming on Gender Budgeting Tools

Step 1: The trainer will brainstorm with the trainees on the following questions;

- What do think of the tools of gender responsive budgeting?

Step 2: After the brainstorming, the trainer will make a brief presentation,

Step 3: Finalized the discussion using trainer's tips and notes.

Trainer's Note

2. Tools and Steps of Gender-Responsive Budgeting

2.1. Gender-Responsive Budgeting Tools

- A. ***Gender-Aware Policy Appraisals:*** How do policies and programmes reflect women's and men's different needs and priorities?
- B. ***Sex-disaggregated Public Expenditure Benefit Incidence Analyses:*** How are women and men benefiting from expenditure on public services, e.g., education, health units or agricultural extension services?
- C. ***Sex-disaggregated Beneficiary Assessments of Public Service Delivery and Budget Priorities:*** How do public investments in infrastructure and the provision of public services address women's and men's different needs and priorities?
- D. ***Gender-Aware Public Expenditure Tracking Surveys:*** How do allocated funds reach female and male beneficiaries differently?
- E. ***Sex-disaggregated Analyses of Budget Impact on Time Use:*** How do expenditures impact differently on women's and men's time use?
- F. ***Sex-disaggregated Revenue Incidence Analyses:*** How are women and men affected differently by the kind of revenues raised by governments such as direct (income, corporate taxes) and indirect taxes (value added tax) or user fees?
- G. ***Gender-Aware Budget Statements:*** How do governments provide information on their actions to reduce gender inequalities in their annual budget statements?

2.2. Steps of Gender-Responsive Budgeting

Several steps are necessary to implement and institutionalize gender responsive budgeting:

Step 1: Collection of gender-sensitive data

The availability of gender-sensitive data is fundamental for gender responsive budgeting. Without sufficient data a meaningful analysis is much more difficult.

Step 2: Sensitization of policy makers

Gender responsive budgeting is not only about budgeting but also about policy making and planning. It is therefore important to raise awareness among policy makers about gender issues and provide them with skills to analyze and address the issues. Sensitization of

planning and finance officers in the Ministry of Trade and Regional Integration and the budget departments of the Institutes Officers who plan and draw up budgets must also be sensitized that the work they are doing may have a different impact on women and men. Sensitization must focus on a change in attitudes of people and new ways of analyzing problems.

Step 3: Training and capacity building

Awareness raising and sensitization are not enough. Different stakeholders of gender responsive budgeting needs different skills and capacities to make a practical difference in the lives of women, men, girl and boy that can be strengthened by training.

Step 4: Advocacy

Experiences of different gender responsive budgeting initiatives have shown that advocacy is central to the success and sustainability of the initiative. The general objective of advocacy work is to influence decision makers.

Step 5: Institutionalizing gender responsive budgeting

Gender responsive budgeting should not be regarded as an add-on activity. The standard budget guidelines such as the annual budget call circular and reporting forms should be changed in a way that includes gender aspects. In this way gender responsive budgeting will become part of the normal budget routine.

Step 6: Analysis of the gendered impact of existing revenues and expenditures

Many empirical studies have shown that the way a government raises revenues and its pattern of public expenditures often benefit women less than men or, even worse, affect women negatively. Usually this is not intended, but a result of gender-blind macroeconomic policy making. Post-budget gender-aware impact analysis may reveal the gendered impacts of public finance.

Step 7: Increase the number of women in budget decision-making

Women and men often have different priorities and needs because of their different social roles and responsibilities. If more women are involved in budget decision making the probability that women's needs and priorities are addressed by public investments is likely to increase.

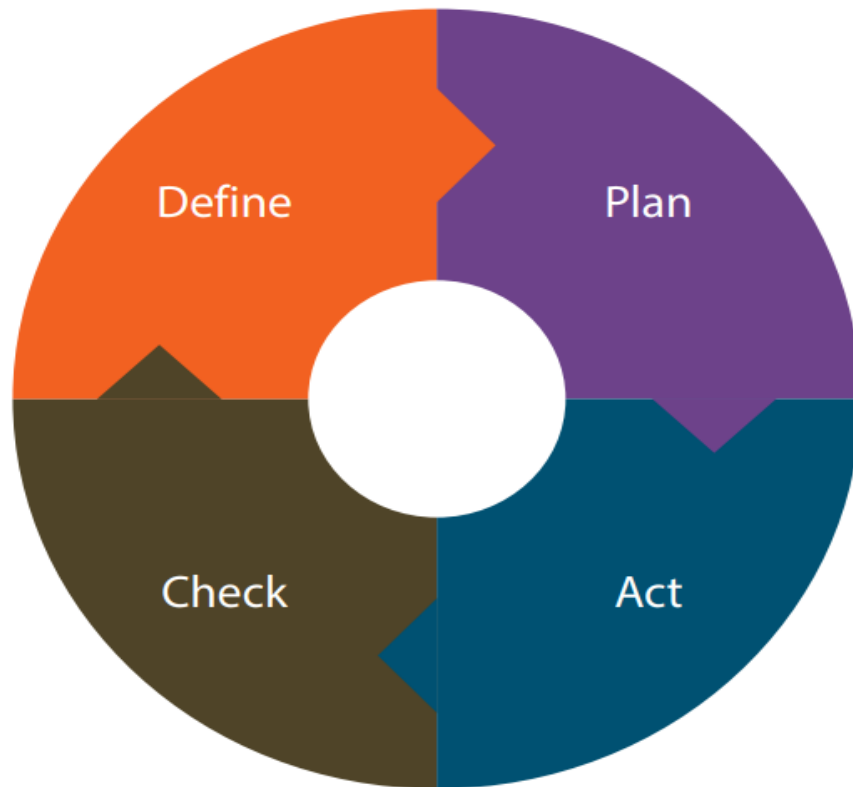
2.3. Challenges in Gender-Responsive Budgeting

- One of the basic challenges in gender budgeting is ***lack of sex disaggregated and gender analytical information*** to picture the differential impact of mainstream budget expenditure commitments.
- ***A resistance rooted in the traditional budget approaches*** due to absence of clear understanding on how gender concerns are linked to development planning.
- It could be challenged by many of the budget actors ***thinking it will add burden to their work and related activities.***
- ***Lack of experts*** knowledgeable in gender analysis and under representation of women in the budgetary process has also a negative effect in the effort of making the budget gender-responsive/sensitive.

2.4. Recommendations for Gender-Responsive Budgeting Good Practice

- Raise awareness among women, politicians and bureaucrats. Lobby to secure political will and work to engage citizens,
- Ensure access to budgets and gender-sensitive, disaggregated statistics,
- Define clear objectives for the changes that are expected from applying gender-sensitive budget analysis,
- When carrying out analysis, check whether policies are gender-sensitive and address situations of inequality,
- Ensure that sufficient funds are allocated to gender-sensitive policies and that they are spent as planned and,
- Monitor and evaluate the impact of policies and expenditure to check whether they have produced the intended effect in promoting gender equity.

Gender Mainstreaming Training Manual



Chapter 6



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Chapter Introduction

The need for gender-aware policy and planning arises from the demographic composition of the population in the country in which women form approximately half of the population and from the fact that while their contribution to social reproduction and unpaid work is a major contribution to national economies, women continue to have low status and are not afforded opportunities to gain benefits from economic and political systems except at the lower levels/bottom of the hierarchy.

It is for this reason that gender-aware policy and planning become important tools to effect a positive change in women's condition. Gender-aware policies and plans are more likely to respond to deep-seated patterns of discrimination against women when women themselves collectively analyze and contribute to policy-making and planning processes. In cases where men are not benefiting equally from development planning strategies, a gender aware approach also enables interventions to correct these imbalances.

This chapter briefly describes the concepts and elements for effective gender planning that have been developed over the decade since the word was firmly presented in global policy at the Beijing Conference in 1995.

Contents

The chapter comprises the following sessions;

- Session One: Definition and Purpose of Gender Planning
- Session Two: Steps of Gender Planning

Objectives

At the completion of this chapter the participants will be able to:

- 🌀 Understand the concept and purpose of gender planning,
- 🌀 Identify four steps of gender planning, and

Chapter Duration

- 2 Hours

Methodology

- Lecture
- Questions
- Reflection
- Brainstorming
- Group Discussions

Required Material

- | | |
|-------------------|----------------|
| ▪ LCD Projector | ▪ Colour Paper |
| ▪ Laptop Computer | ▪ Handout |
| ▪ Flip Chart | ▪ Masking Tape |
| ▪ Markers | ▪ Sticker Note |
| ▪ Pens | ▪ Hard paper |
| ▪ Note Book | ▪ Case Studies |

Session One: - Definition and Purpose of Gender Planning

| | |
|----------------------------|--|
| Session One | Definition and Purpose of Gender Planning |
| Duration | 40 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none">▪ Define the concept of Gender Planning▪ Explain the purpose and importance of Gender Planning |
| Content | Definition of Gender Planning Purposes of Gender Planning |
| Methodology | Lecture, Reflections, Group Discussions and Presentations |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 1: Brainstorming on Concepts of Gender Planning

Step 1: The trainer will brainstorm the trainees with the following questions;

- How do you define Gender Planning?
- What do think of the importance of Gender Planning?

Step 2: After the brainstorming, the trainer will make a brief presentation on the concept of Gender Planning in line-with the trainers note.

Trainer's Note

1. Definition and Purpose of Gender Planning

1.1. Definition of Gender Planning

Gender planning refers to the process of planning and designing the implementation phase of policies, programs, or projects from a gender perspective, and it takes place in the second stage of the policy cycle. It is the technical and political processes and procedures necessary to implement gender-sensitive policy and practice.

Likewise, The European Commission defines gender planning as ‘an active approach to planning which takes gender as a key variable or criterion and which seeks to incorporate an explicit gender dimension into policy or action’.

Gender planning is also focusing on mainstreaming gender in the projects or programs through gender analysis. It involves all the steps between analysis and incorporating that analysis into the policy and program decisions that will contribute to equality of outcomes for men and women in all development work. In other words, gender planning is essential for gender mainstreaming, which is about advocacy, networking and knowledge management that ensuring that such diverse elements produce coherent results requires a clearly defined strategic plan.



1.2. Purposes of Gender Planning

It is not possible to realize gender equality and equity, without a clear gender plan. Besides, so as to incorporate gender perspectives into policies, programs and projects; the needs of women and men must be taken into account at all stages of the cycles. However, in many cases, individuals and entities within the organizations that have been responsible for gender planning are attempting to fulfill this responsibility without any clear strategy in place.

Gender planning comes from knowing that different groups of women and men have different needs, different levels of access and control over resources, and various opportunities and constraints. It pays particular attention to unequal gender relations and structural inequalities in different policy areas by responding to the needs of women and men and through a more even distribution of resources, actions, responsibilities and power.

In more everyday language, gender planning is important to:

- Promote gender equality,
- Mainstream gender in the planning process towards gender equality,
- Integrate gender as a transversal theme in planning, implementing and monitoring development projects,
- Facilitates the interests and needs of women and men to be made visible also avoids conflict of interests between them, and
- Allows policymakers to understand gender equality when planning an intervention.

Session Two: - Steps of Gender Planning

| | |
|----------------------------|--|
| Session One | Steps of Gender Planning |
| Duration | 80 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none"> ▪ Explain 4 steps and its features of Gender Planning |
| Content | Steps of Gender Planning |
| Methodology | Lecture, Reflections, Group Discussions and Presentations |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 2: Group Work on Problem Prioritization

Step 1: Divided the trainees in to manageable group's size.

Step 2: Distribute the question item template to each groups.

The following table represents an example of gender planning exercises.

| Problem Identified | How many people does it affect? | | How does it affect? | | Prioritize the problem based on the given information |
|---|---------------------------------|-----|---------------------|-----|---|
| | Women | Men | Women | Men | |
| shortage physical resource (Land) for entrepreneurs | | | | | |
| No credit availability for investment | | | | | |
| limited participation in trade policy formulation | | | | | |
| Lack of raw materials for manufacturing industries | | | | | |
| Lack of market linkage and information | | | | | |

Step 3: Ask the groups to analyze and fill out the table based on the questions in the table.

Step 4: Let the groups to discuss and reflect their point of view.

Step 5: Let the groups to present their discussion results.

Step 6: Summarize the group discussion using trainer's note.

Trainer's Note

2. Steps of Gender Planning

2.1. Step 1: Defining the Problem

At this step of gender planning, Identify the major problem in which, urgent, and the most affects problem has to be prioritize. The needs, roles, resources, opportunities and the constraints of women and men for intervention in the respective area are identified through gender analysis.



2.2. Step 2: Defining the Policy/Program/Project

This gender planning step implies deciding what gender-aware approach will be the most suitable for the policy intervention. This step can be a gender-mainstreaming step, which aims to benefit women and men equally, or a gender-specific approach, which takes into account the gender differences that emerged during the problem definition and that target (a particular group of) women or men specifically.



The adoption of participatory policy approach to gender planning simplifies;

- Makes it possible to identify the problems, needs and expectations of the women and men whose lives will be directly affected by the policy;
- Allows for a better understanding of how gender relates to the content of policy measures;
- Increases participants' empowerment and trust in public institutions;
- assists in preventing and managing risks, unexpected results and conflicts; and
- Increases the effectiveness and efficiency of policies through the involvement of affected parties.

2.3. Step 3: Design Intervention

In this step, decision-makers identify the outcomes of the intervention, the actions to be taken in order to achieve the outcomes, the partners and their roles and the necessary budget, along with the delivery procedures, timing and organizational structure.

This step also identify specific gender indicators of the intervention for both women and men, disaggregated by specific target groups and taking account of how gender intersects with age, race, education, disability or among other factors.



2.4. Step 4: Defining the Budget

At this gender planning stage, decision-makers have to allocate adequate resources to meet the gender objectives and reach the planned outcomes. Gender budgeting may be used to ensure the adequate reflection of both women's and men's needs in the allocation of resources for the intervention measures.

In order to ensure a successful participatory gender planning steps, the following are some of the key elements that should be taken into account:

- Ensuring the participation of women especially those who may not be traditionally represented in decision-making structures;
- Implementing a time frame that suits all participants, both women and men;
- Ensuring the participation of gender experts, especially in decision-making;
- Addressing women's practical needs and gender strategic interests;
- Making gender planning suitable for the local context;
- Avoiding unequal power relations between women and men during the process;
- Sharing the results and proposals with the target groups of the plan.

Finally, a participatory gender planning step also includes identifying and engaging relevant partners who can bring expertise and knowledge into the planning phase. In this context, women's organizations and others that have expertise in gender-related planning and implementation should be involved in the delivery of the intervention.

Gender Mainstreaming Training Manual



Chapter 7



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Chapter Introduction

In ideal situation, gender equality and equity concerns should be built in to every step of policies and program/ project cycles. This requires gender to become an integral part of any policy and program/project monitoring and evaluation plan, review exercise and monitoring and evaluation activities.

Moreover, Men and women have different needs and constraints that have to be presented and addressed in a different way. However, most conventional monitoring and evaluation systems do not fully assess the responsiveness of projects to the different needs of men and women and the effects of gender differences in project impacts. Therefore, a gender-responsive M&E system is important in identifying and integrating gender issues in the project cycles.

This chapter mainly targets to boost skills in gender responsive monitoring and evaluation. Likewise, it is expected to raise awareness on importance of integrating gender dimension in project monitoring and evaluation.

Contents

The chapter is comprises the following sessions;

- Session One: Concepts of Gender Responsive Monitoring and Evaluation
- Session Two: Gender Responsive Monitoring
- Session Three: Gender Responsive Evaluation

Objectives

At the completion of this chapter the participants will be able to:

- ☞ Describe the concepts and the need for gender responsive monitoring and evaluation,
- ☞ Identify steps for integration of gender dimension in monitoring and evaluation,
- ☞ Describe concepts and aspects of gender responsive monitoring and evaluation,
- ☞ Identify and design gender sensitive monitoring and evaluation indicators,
- ☞ Design measurements of gender sensitive indicators,
- ☞ Apply gender responsive monitoring and evaluation tools, and
- ☞ Explain features and concepts of gender responsive evaluation.

Chapter Duration

- 4 Hours

Methodology

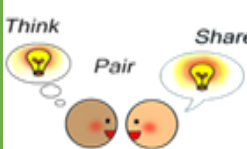
- Lecture
- Questions
- Reflection
- Brainstorming
- Group Discussions
- Case study

Required Material

- LCD Projector
- Laptop Computer
- Flip Chart
- Markers
- Pens
- Note Book
- Colour Paper
- Handout
- Masking Tape
- Sticker Note
- Hard paper
- Case Studies

Session One: - Concepts of Gender Responsive Monitoring and Evaluation

| | |
|----------------------------|---|
| Session One | Concepts of Gender Responsive Monitoring and Evaluation |
| Duration | 60 minutes |
| Learning Objectives | <p>By the end of this session trainees will be able to:</p> <ul style="list-style-type: none"> ▪ Discuss the importance of Monitoring & Evaluation, ▪ Explain differences between Monitoring & Evaluation, ▪ Understand Gender Responsive Monitoring & Evaluation, ▪ Explain the need and stages for integration of Gender in M&E, ▪ Explain how to make M&E more Gender Responsive. |
| Content | <ul style="list-style-type: none"> ▪ Introduction to Monitoring & Evaluation ▪ The Difference between Monitoring & Evaluation ▪ Definition of Gender Responsive Monitoring & Evaluation ▪ The Need for Integration of Gender Dimension in M&E ▪ Stages for Integrating Gender in M&E ▪ How to Make M&E More Gender-Responsive in a Program and Project |
| Methodology | Lecture, Reflections, Group Discussions and Presentations |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 1: Think pair share on Monitoring & Evaluation

Step 1: the trainer will instruct the trainees to pair each other.

Step 2: The trainer will ask the trainees to discuss in pair on the following questions;

- How do you define monitoring and evaluation?
- What do you think of the difference between M&E?

Step 3: Allow participants to reflect summary of their discussion.

Step 4: Summarize the reflections in line-with the trainers note.

Trainer's Note

1. General Concepts of Gender Responsive Monitoring and Evaluation

1.1. Introduction to Monitoring & Evaluation

Definitions of Monitoring & Evaluation

Monitoring and Evaluation (M&E) are project management systems that enable to ensure whether a project is being efficiently implemented, achieving set objectives and the project reaches the intended target group in a sustainable manner.

Monitoring is the systematic process of collecting, analyzing and using information to track a program's progress toward reaching its objectives and to guide management decisions. Monitoring usually focuses on processes, such as when and where activities occur, who delivers them and how many people or entities they reach. Monitoring is conducted after a program has begun and continues throughout the program implementation period. Monitoring is sometimes referred to as *process, performance or formative evaluation*.

Evaluation is the systematic assessment of an activity, project, program, strategy, policy, topic, theme, sector, operational area or institution's performance. Evaluation focuses on expected and achieved accomplishments, examining the results chain (inputs, activities, outputs, outcomes and impacts), processes, contextual factors and causality, in order to understand achievements or the lack of achievements. Evaluation aims at determining the relevance, impact, effectiveness, efficiency and sustainability of interventions and the contributions of the intervention to the results achieved.

M&E addresses the following questions:

- Are activities carried out as planned?
- Is program/project providing, to whom/when/how often/long, in what context?
- Are the activities accessible? And is activity quality adequate?
- Is the population (women/girls; men/boys) you intend to engage being reached?
- What outcomes are observed? And does the program make a difference?

- To what extent is the program responsible for the observed changes?

Importance of Monitoring & Evaluation

M&E are important for the following reasons:

- Monitoring and evaluation inform decision-making on the future of a program/project;
- Monitoring and evaluation serve as a vehicle to increase program/project effectiveness;
- Monitoring and evaluation are important to augment institutional development and strengthening through learning;
- Monitoring and evaluation are inputs for capacity building among beneficiaries and program and policy formulators;
- Monitoring and evaluation meet public and donors accountability requirements;

Monitoring and evaluation are also significant tools to examine whether a project or program is properly addressing social gaps and spatial distribution of project benefits across different level of society.

1.2. The Difference between Monitoring & Evaluation

Although, monitoring and evaluation are complementary, they are distinct processes and have the following differences:

| <i>Monitoring</i> | <i>Evaluation</i> |
|--|---|
| ➡ Monitoring follows a management model with a focus on improving day-to-day program /project operation. | ➡ Evaluation uses a research model to assess the extent to which project/program objectives have been met or surpassed. |
| ➡ Monitoring is at the micro implementation level to ensure that project activities are on track. | ➡ Evaluation looks broadly at whether or not the overall outcome/impact is met. |
| ➡ Monitoring is usually carried out more frequently | ➡ Evaluation is usually carried out less frequently. |
| ➡ Monitoring is usually undertaken by internal stakeholders. | ➡ Evaluation often involves external or independent evaluators. |

Activity 2: Brainstorming on Gender responsive Monitoring & Evaluation



Step 1: The trainer will brainstorm the trainees with the following question;

- How do you define gender responsive monitoring and evaluation?

Step 2: Allow the participant to reflect their point of view.

Step 3: Summarize the reflections using training notes.

Trainer's Note

1.3. Definitions of Gender Responsive Monitoring and Evaluation

Gender responsive M & E measures the extent to which programs, projects and policies have addressed needs of men and women and have made an impact on their lives.

In light of this perspective the gender responsive M&E aims to review the programs, projects and policies on women and men with respect to the following points;

- The progress and the contributions of programs, projects and policies towards improvement of the livelihood of women and men in addressing the problems as identified at the project planning stage.
- The effects of the activities of the programs, projects and policies on women's and men's income, the access it has created to material and financial resources and employments.
- The size and division of labour between men and women in the programs, projects and policies.
- The contributions of each sex group to the programs, projects and policies and their respective share of benefits.
- The nature of statistical means used to quantify and record the work of women and all other contribution in the programs, projects and policies.
- Constraints which directly or indirectly affects women's participation and the distribution of benefits.

- Recommendation for future project progress and programs, projects and policies designs, particularly to adjust and articulate them from gender perspectives.

1.4. The Need for Integration of Gender Dimension in M&E

Women and men have different needs and also face different constraints because of their various socio-economic roles. However, many development projects often overlooked these differences by adopting a gender neutral approach which assumes that men/boys and women/girls will benefit equally from the programs, projects and policies and its services without having to make any special provisions. Considering gender in programs, projects and policies implementation will lead to ensuring equitable opportunities for men and women to access, participate in, and benefit from programs, projects and policies services and activities.

It is also important to remember that data must be collected and disaggregated by sex and age to inform programs, projects and policies decision-making and ultimately to measure its impact on men, women, boys and girls; their roles and relations, inequities in participation, access and benefits respectively accrued.

Matching to those facts, Gender must be viewed in a sustainable way also we will raise other issues in the monitoring and evaluation for the same reasons. Additionally, the following issues cannot be measured or monitored without gender-sensitive indicators:

- The impact/effectiveness of activities targeted to address women's or men's practical gender needs **i.e.**, new skills, knowledge resources, opportunities or services in the context of their existing gender roles;
- The effectiveness of activities designed to increase gender equality of opportunity, influence or benefit **e.g.**, targeted actions to increase women's contribution to decision-making; opening up new opportunities for women/men in non-traditional skill areas;
- The impact/effectiveness of activities designed to develop gender awareness and skills amongst policy-making, management and implementation staff;
- The impact/effectiveness of activities to promote greater gender equality within the staffing and organizational culture **e.g.**, the impact of affirmative action policies.

In general, when gender sensitivity is properly incorporated into a monitoring and evaluation system, it allows for the uncovering of information gaps and false assumptions in program and project designs. Moreover, gender is a cross-cutting issue within the development policies, thus, if their impacts are not integrated in projects M&E, they are unlikely to be given any attention.



Activity 3: Group Work on Stages for Integrating Gender Responsiveness in Monitoring & Evaluation

Instruction: Ask trainees to bring project documents (otherwise the trainer can find these documents) and if selection of project documents is necessary make a selection from different sectors (Trade or Industry).

Step 1: Group the trainees in to manageable size based on the available project documents.

Step 2: Ask the groups to review/analyze the documents whether the project M&E integrate gender demission in their monitoring and evaluation.

Step 3: Ask the participants to rate the documents as gender responsive, gender neutral and gender blind, and reason out for their rating

Step 4: If they are gender responsive, at what stage did they integrate them and if not do they need independent gender responsive monitoring and evaluation. Make sure that consensus is built on what should be done to make the M & E gender sensitive and responsive.

Step 5: After the group work, the trainer will summarize the discussion using the trainers note.

Trainer's Note

1.5. Stages for Integration of Gender Dimension in M&E

There are two main options to integrate gender in Monitoring and Evaluation system and these are as follows:

I. Integrate Gender into Existing Monitoring and Evaluation

An effective gender-sensitive monitoring and evaluation system in development intervention requires the following key activities be undertaken at different stages of the project/program cycle:

Stage One: Identification and Preparation

In this stage the following activities are undertaken:

- Ensure that the benchmark survey or baseline studies are gender sensitive.
- Identify gender-related goals and priorities based on available information and consultation with stakeholders.
- Undertake an initial gender study or analysis to identify the potential negative impacts of project intervention on women/men.
- Assess the institutional capacity for integrating gender into development activities.

Stage Two: Design and Appraisal

In this stage two of design and appraisal the following points need attention:

- Ensure gender is integrated into goals and objectives and clear targets are set.
- Plan developing capacity to address gender issues so as to monitor and evaluate progress.
- Set up an M&E system (Adopt and “engender” the Logical Framework).
- Identify and select key gender-sensitive indicators for input, output, outcome and impact.
- Develop/select the “best” data collection methods and decide on timing.
- Organize reporting and feedback processes, clearly identifying who will collect and analyze information and when, and who will receive it.

Stage Three: Implementation

The stage requires carrying out the following activities:

- Carry out capacity development exercises for integrating, and for monitoring and evaluating, gender-related issues.
- Collect gender-sensitive data based on the selected indicators.
- Monitor the progress against targets set for the period under evaluation, and feedback results into the system to allow for midterm corrections.

- Assess progress; Make corrections if needed to obtain expected gender-related outcomes.

Stage Four: Implementation and Completion

The completion stage involves and assesses the following points:

- Assess impact of gender integration in the overall project/programs context.
- Assess impact of project/program interventions on men and women.
- Share lessons that can feed into the overall development project/program goals and objectives.

II. Developing an independent gender monitoring and evaluation system in areas where a project/program does not have an overall M & E system

This involves incorporating gender issues into each stage of the basic model. Before the design it is also important to understand the economic, social, political and institutional context within which the program will be developed. It also involves identifying the major stakeholders interested in the gender dimensions of the projectprogram and their primary areas of concerns.

Summary of the main steps in conducting a gender sensitive M&E system

| Stage of the study | Key issues Addressed |
|-----------------------------|--|
| <i>Justifying the study</i> | <ul style="list-style-type: none"> ➡ Do both women and men constitute the study clients ➡ Is the problem analyzed and information collected from a gender perspective ➡ Do stakeholders include women and their views and priorities |
| <i>Defining the study</i> | <ul style="list-style-type: none"> ➡ Women should be mentioned as target of the study |
| <i>Designing the study</i> | <ul style="list-style-type: none"> ➡ Women should be the target of study and selected sample should be represented of both men and women ➡ Data collection instruments should be engendered ➡ Data collection methods should enhance the participation of men and women |

| | |
|--|---|
| <i>Conducting the study</i> | <ul style="list-style-type: none"> ➡ Gender sensitive data collectors and supervisors ➡ Multiple data collection methods to check quality of the data collected. |
| <i>Data analysis, Report preparation and Dissemination</i> | <ul style="list-style-type: none"> ➡ Data analysis should include gender analysis ➡ Report discussions should be with stakeholders including women and women's organization ➡ Women should be involved in the action plan. |

1.6. How to Make M&E More Gender-Responsive in a Program and Project

There are five points to make monitoring and evaluation more gender responsive in programs and projects:

- a.** Involve women in setting-up and implementing the monitoring system;
- b.** Differentiate the indicators by gender in order to gauge the gender specific impacts;
- c.** Address women as a distinct group during data collection (or apply sex disaggregated approach);
- d.** Analyze the information in relation to gender-specific questions;
- e.** Consider women as a separate category when presenting findings, drawing conclusions and formulating recommendations.

Session Two: - Gender Responsive Monitoring (GRM)

| | |
|----------------------------|---|
| Session One | Gender Responsive Monitoring (GRM) |
| Duration | 60 minutes |
| Learning Objectives | <p>By the end of this session trainees will be able to:</p> <ul style="list-style-type: none"> ▪ Understand aspects (features) of gender responsive monitoring; ▪ Identify levels of gender responsive monitoring; ▪ Describe gender responsive monitoring plan; ▪ Define gender sensitive indicators; and ▪ Instruct skill on how to conduct gender responsive monitoring |
| Content | <ul style="list-style-type: none"> ▪ Aspects (features) of Gender Responsive Monitoring ▪ Important Information for Conducting Gender Responsive Monitoring ▪ Tools of Gender Responsive Monitoring |
| Methodology | Lecture, Reflections, Group Discussions and Presentations |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 4: Group Discussion on Gender Responsive Monitoring (GRM)

Step 1: Group the trainees in to manageable size

Step 2: The trainer ask the trainees or groups to define and reflect gender responsive monitoring and aspects of GRM.

Step 3: Allow the trainees to present their discussion points.

Step 4: The trainer will conclude the discussion using the trainer's note.

Trainer's Note

2. Gender Responsive Monitoring (GRM)

2.1. Aspects (features) of Gender Responsive Monitoring

Gender responsive monitoring is not simply counting and reporting how many women benefited from policy, program and project. While GRM involves adjusting monitoring indicators, and sometimes including specific gender sensitive indicators, to ensure that they measure the progress towards program/ project objectives for men and women, and that gender disparities are not being made worse by the intervention but progress is being made towards gender equality.

The main aspects of gender responsive monitoring are discussed below:

- Levels of Gender Responsive Monitoring
- Gender Responsive Monitoring Plan
- Gender Responsive/Sensitive Indicators

i. Levels of Gender Responsive Monitoring

In most case; levels of gender responsive monitoring is undertaken at two different levels and both levels require setting targets and developing indicators to measure progress towards meeting those targets. These are:

a. Monitoring progress towards fulfilling concrete goals and objective

- Indicators must be developed that track the delivery of specified activities/outputs and outcomes/impact.
- It is a crucial part of the project management as it is carried out to observe the progress of the project implementation in order to ensure:
 - ✓ If inputs, activities, outputs and project assumptions are proceeding according to the plan, and
 - ✓ If they are progressing towards achieving the project objective including the dimension of gender equity.

b. Monitoring the implementation process

- Targets and indicators must be developed that show the extent to which the process itself is gender responsive. Monitoring the process will:
 - ✓ Allow you to identify problems and gaps in the process that can be immediately addressed.
 - ✓ Allow you to improve the design of future initiatives in more participatory and gender responsive ways.
 - ✓ Document obstacles to mainstreaming gender aspects in project implementations that can be later addressed in a wider institutional context

Question to be considered in gender responsive monitoring process might include;

- Are men & women equally participating and treated with equal respect, as decision makers, implementers and participants?
- Are those involved in policy/program/ project implementation continually motivated to maintain a gender perspective (opportunities to update their gender knowledge and skills and discusses gender issues in non-judgmental environment?)
- Are obstacles to women participation being dealt with systematically?

ii. Gender Responsive Monitoring Plan

Plans for gender responsive monitoring of both substantive progress and the implementation process. This plan should be developed and included in an official project implementation document.

This plan should specify:

- Who is responsible for monitoring tasks?
- How other stakeholders will participate in the GRM?
- When will the GRM take place?
- What tools will be used to record observations?
- What mechanisms exist to review progress? ('periodic appraisal' or 'review sessions')



Activity 5: Brainstorming on Gender Responsive/Sensitive Indicators

Step 1: The trainer will brainstorm the trainees with the following questions;

- What are targets, indicators and gender sensitive indicators?

Step 2: Let trainees to discuss and reflect their point of view.

Step 3: After the brainstorming, the trainer will summarize the discussion using trainer's note.

Trainer's Note

iii. Gender Responsive/Sensitive Indicators

Gender Sensitive Targets

What are Targets?

- Targets are set so that we can keep our eye on the prize. The word target can be defined as an aim in general, and it has the figurative meaning of 'distance' or 'mark.' Targets make our goals concrete; therefore increase the possibility that they will be attained. Effective targets are progressive, realistic, time-bound and measurable.
- Gender sensitive targets means a target that consider the situation and needs of both women and men.

Gender Sensitive Indicators

What are Indicators?

- Indicators are defined as statistical series, and all other forms of evidence that enable us to assess where we stand and where we are going with respect to values and goals. Indicators evaluate specific programs and determine their impact. Indicators are the building blocks of an effective M&E system. They are highly context specific and uniquely representative of a particular program.

Effective indicators are:

- **Comparable longitudinally (over time)** – indicators that are measure signs of progress or decline. Comparable with other countries, regions or target audiences.
- **Measurable** – you need to be able to quantify or categorize your results.
- **Precise** – choose indicators whereby effects of external and environmental factors, other than those you hope to measure, are minimized.
- **Selective/representative** – since too many indicators are difficult to track.

A Gender-Sensitive Indicator, therefore, can be defined as an indicator that captures gender-related changes in society or in the context being dealt over time. Gender responsive indicators have special function of pointing out gender related changes in projects over time.

Types of Indicators

- a. Risk/Enabling Indicators
- b. Input Indicators
- c. Process Indicators
- d. Output Indicators
- e. Outcome Indicators

Showing Case for Types of Indicators (Women - Participation Indicators)

a. Risk indicators

- Government support for local participation.
- Potential support of different sectors of the local population to participation (e.g. men, women, regional organizations, local elites).
- Project dominated by different sectors of the population.
- Degree of long-term commitment by stakeholders.

b. Input indicators

- Levels of input of women/men at different levels (government departments, donors, local stakeholders) to identification and planning.

Input and process indicators (of sustainability)

- Audit of resources or funds held regularly and openly.

- Existence of a set of rules that were developed in a participatory fashion, and all members of the community (women and men) were partly/fully involved.
- Reduced dependence on external resources.

Input and process indicators (of control)

- Frequency of attendance by women and men, by socio-economic grouping.
- Number of women and men in key decision-making positions,
- Rotation of people in leadership positions. Input and process indicators (of activities)
- Project input take-up rates.
- Levels of women's and men's inputs, by socio-economic grouping, in terms of labor, tools, money, etc.
- Maintenance of physical installations by women/men

c. Process indicators (of scale and make-up)

- Number of local women's and men's groups established.
- Membership of groups by socio-economic grouping and sex.
- Rate of growth/drop-out of membership by socio-economic grouping and sex.
- Socio-economic, age and ethnic make-up of women and men attending meetings.

d. Output indicators (of benefit and returns)

- Benefits going to men and women, by socio-economic grouping, ethnicity and age (e.g. increased employment, greater crop yields).
- Benefits to the community (e.g. community assets such as a school created to which all have access).

e. Outcome/Impact indicators

- Use made of benefits to men and women, by socio-economic grouping, ethnicity and age (e.g. how extra income was spent and who controlled it).
- Uses made of community benefits, by sex, socio-economic, race and age.
- Levels of participation by different stakeholders (women and men) in evaluation.
- Degree to which lessons of evaluation are acted upon by different stakeholders (women and men).

2.2. Important Information for Conducting Gender Responsive Monitoring

The following are identified as important points for gender responsive monitoring:

- ✓ Sex disaggregated data
- ✓ Baseline data
- ✓ Log-frame (Project document)
- ✓ Action Plan
- ✓ Daily/weekly/monthly/Progress Reports.

The definition and importance of the information are summarized in the table.

| Type of Information | Definition | Why Important for Gender Responsive Monitoring |
|--|---|--|
| <i>Sex disaggregated data</i> | <ul style="list-style-type: none"> ➡ Cross-classified by sex, presenting information separately for women and men, boys and girls. | <ul style="list-style-type: none"> ➡ Important to evaluate and monitor project activities, outcomes and to draw conclusions on results for women, girls, boys and men. |
| <i>Baseline data</i> | <ul style="list-style-type: none"> ➡ Indicates situations before project implementation. | <ul style="list-style-type: none"> ➡ Important to enable comparison with the situation after the implementation of the project |
| <i>Project document</i> Action Plan Log-frame (result framework) | <ul style="list-style-type: none"> ➡ Shows time set for project activities ➡ Way of structuring the main elements in a project and highlight the logical linkages between them. | <ul style="list-style-type: none"> ➡ Important to monitor project activities are executed according to the stated timeframe. ➡ Shows linkage between; <ul style="list-style-type: none"> ✓ activities and outputs ✓ outputs and outcomes ✓ outcomes and objectives ✓ objectives and goals |
| <i>Daily, monthly and weekly progress reports</i> | <ul style="list-style-type: none"> ➡ Complied reports during the project implementation. | <ul style="list-style-type: none"> ➡ Important documents to look the project implementation status during its day today project execution periods |



Activity 6: Group Discussion on the relationship between monitoring tools and development project types

Step 1: Start the discussion by mentioning that the tools we use for monitoring purposes differ from project to project and highly determined by project monitoring levels.

Step 2: Draw table that shows the relationship among gender monitoring tools and development project types on flip chart and leave empty in the Monitoring Tools and Remarks columns.

Step 3: Ask trainees which tools are very appropriate for the listed projects and why?

Step 4: Cross check their suggested tools with the table in trainer's note.

Step 5: summarize the discussion using trainer's note.

Trainer's Note

2.3. Tools of Gender Responsive Monitoring

There are a range of tools that can be used for conducting gender responsive monitoring. The context, the feasibility of the tools, their effectiveness and efficiency, and their capability to deliver information to make sound judgment are determinant factors for selection of tools to specific monitoring purpose. Thus, the selection of tools requires careful analysis of what to monitor.

The following tools are used in conducting gender responsive monitoring. These lists are not complete, as tools and techniques are continually evolving in the monitoring field.

a) Interviews:

- *Open-ended (semi-structured) and Closed ended (structured) interview.*

In exercising this tool on gender responsive monitoring the following points need to be considered:

- ✓ Include male and female population in the sample.
- ✓ Ensure men/women interviewers with gathering gender desegregated data.
- ✓ Interview men and women separately.
- ✓ Schedule interviews paying attention to men's and women's different work.
- ✓ Identify and address constraints to women's participation.

b) Observations:

- It is a good technique for collecting data on behavioral patterns, physical conditions, knowledge, and attitude and practice aspect from a gender perspective.

In utilizing this tool it is important to pay attention to the following points:

- ✓ Use men and women participant observers.
- ✓ Ensure observations and analysis of existing situation provides a clear insight into gender based differences of all monitoring topics covered.

c) Questionnaires:

- When this tool is used for gender responsive monitoring; questionnaires should be designed by including gender responsive indicators and sex disaggregated information.

d) Random or Purposive Survey:

- In random survey each individual in the population has an equal likelihood of selection.
- A purposive sample is a non-representative subset of some larger population, and is constructed to serve a very specific gender need or purpose.

e) Focus Group Discussion:

- It is a discussion with a small group (usually 8 to 12) of participants to record attitudes, perceptions and beliefs relevant to the issues being examined in the monitoring process.

In using this tool for gender responsive monitoring it is important to consider the following points;

- ✓ Use men and women facilitators.
- ✓ Identify sample needs, priorities, and constraints of both male and female.
- ✓ Perform additional exercises with men and women in separate groups.
- ✓ Schedule group meetings, paying attention to men's and women's different work.
- ✓ Identify and address other constraints to women's participation, such as childcare, domestic duties, distance, and cultural constraints.

f) Expert Panels:

- Usually as a mechanism for synthesizing information from a range of sources, drawing on a range of viewpoints, in order to arrive at overall conclusions.

g) Critical Reference Groups:

- Defined as participatory spaces established for the systematic involvement of relevant stakeholders in the monitoring process.

h) Secondary Sources and Reports:

- It gathers the existing documented information on the specific topic.

This tool provides an introduction to the existing knowledge of the topic monitoring. Such as;

- ✓ Identify availability of data disaggregated by sex/gender.
- ✓ If yes, identify areas covered.
- ✓ Identify major gaps in the information.
- ✓ Gather sex/gender disaggregated data.
- ✓ Gather recorded project implementation reports

i) Participatory techniques (e.g. mapping, timelines) of most significant change (MSC):

- Based on stories about important or significant changes, rather than on indicators.
- It includes *Social Mapping* and *Case Studies*.
- *Social Mapping*: provides a visual display of community members perceptions of the physical dimension in gender disaggregated manner and different wealth levels.
- *Case Study*: help in highlighting problems and issues of an individual or a household within a community by considering gender features.

Session Three: - Gender Responsive Evaluation

| | |
|----------------------------|---|
| Session One | Gender Responsive Evaluation |
| Duration | 60 minutes |
| Learning Objectives | <p>By the end of this session trainees will be able to:</p> <ul style="list-style-type: none"> ▪ Realize the basic concepts of gender responsive evaluation; ▪ Explain evaluation tools and techniques; and ▪ Describe finalization stage of evaluation. |
| Content | <ul style="list-style-type: none"> ▪ Definition and Objectives of Gender Responsive Evaluation ▪ Common Elements for Gender Responsive Monitoring and Evaluation ▪ Contents of Gender Responsive Evaluation (What to evaluate) ▪ Types of Evaluation ▪ Who Undertakes Gender Responsive Evaluation? ▪ The Feedback Aspect of Gender Responsive Evaluation |
| Methodology | Lecture, Reflections, Group Discussions and Presentations |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 7: Reflection on the definition and objectives of gender responsive evaluation

Step 1: Open the discussion with trainees to define and explain the importance of gender responsive evaluation.

Step 2: Write down on flip chart key points mentioned by trainees during the discussion and let them to reflect on it.

Step 3: Finalize the discussion by giving feedback (and/or) presentation based on the the trainer's note of this session.

Trainer's Note

3. Gender Responsive Evaluation

3.1. Definition and Objectives of Gender Responsive Evaluation

Evaluation is a project/program management tool that seeks to understand how successful projects/programs are and to what extent they fulfill the objectives sustainably. Project/program evaluation process is a one-time systematic and independent examination of development intervention.

Accordingly, **gender responsive evaluation** is a periodic assessment of relevance, effectiveness, efficiency, impact and sustainability, both expected and unexpected, of project in relation to stated goals by taking consideration of gender indicators. Gender responsive evaluation is also a systemic tool for assessing whether a policy, program and project intervention has achieved its goals, measuring impact of initiatives, and importantly establishing good practice and lessons learned for future initiatives to bring about gender equity and equality.

Gender responsive evaluation has the following objectives:

- Determines whether the project/program implementation achieved the expected outputs, outcomes and impact in gender responsive manner.
- Establishes causality and focuses on the links between gender sensitive inputs and outputs and between outputs and impacts indicators.
- Contributes the lessons from evaluation to future development projects/programs with gender dimensions.
- Identifies clearly the external factors that influence project/program outcomes as well as the true contribution of the intervention to gender development objectives.

Here worth to mention in conducting gender responsive evaluation is the importance of looking at the following points:

- Who determines the evaluation criteria?
- What level of importance or priority is afforded to gender equality?

3.2. Common Elements for Gender Responsive Monitoring and Evaluation

Gender responsive monitoring and evaluation have a common target of examining performances of interventions from gender perspectives in different span of time. Due to their differences in timing and scope the indicator types each address and the type of techniques each uses may differ. However, some of the points that are addressed in gender responsive monitoring are applicable to gender responsive evaluation with some adjustment in line with the specific objectives of gender responsive evaluation. The common elements are:

a. Gender responsive monitoring and evaluation tools

- The tools mentioned in gender responsive monitoring section of the previous chapter can also be used for gender responsive evaluation.
- So when dealing with gender responsive evaluation section it is important to revisit and remember the tools stipulated in relation to gender responsive monitoring.

b. Gender responsive indicators

- Essential part of any monitoring and evaluation job. In gender responsive monitoring input indicators, progress and process indicators and output indicators are used.
- In gender responsive evaluation, however, outcome indicators, impact indicators and sustainability indicators, which will be addressed in-depth in this section, are used.
- Quantitative and qualitative indicators, which were discussed under are equally relevant and can be imported/used for gender responsive evaluation.

3.3. Contents of Gender Responsive Evaluation (What to Evaluate)

A. Evaluation of outputs (Have objectives been met?)

- It should reflect gender balance in terms of outputs use and outputs delivers of a project/program services. The assessment scope envelopes the following points:
 - ✓ Level of increase of women owning project/program outputs.

- ✓ Increase in number of groups formed and implementing the project/program.

B. Evaluation of process (How were outputs and outcomes delivered?)

- Both process monitoring and process evaluation focus on how and by whom project/program activities are undertaken.
- However, unlike process monitoring process evaluation is mostly undertaken after the project/program implementation and its findings are used to make future projects/program more inclusive and participatory to all segments of the society including women.
- In most cases process evaluation focuses on how a specific project/program operated and designed to answer the questions of how it was done and by whom.

Process evaluation helps to evaluate the following elements by using gender lens:

- ✓ How, why, and by whom program decisions were made and whether women had significant stake,
- ✓ The role of both women and men in providing needed resources,
- ✓ The role of both women and men in running the project outcomes,
- ✓ The conditions (social, legal, economic, cultural) in which the project operated, and
- ✓ Unexpected challenges, opportunities and barriers encountered in running the program from gender perspectives.

C. Progress Evaluation

- The purpose of a progress evaluation is to assess progress in meeting the goals of the program.
- It involves collecting information to learn whether or not the benchmarks of participant progress were met and to point out unexpected developments.
- Progress evaluation collects information to determine what the impact of the activities and strategies on participants, curriculum, or institutions at various stages.
- By measuring progress, program staff can eliminate the risk of waiting until participants have experienced the entire program to assess likely outcomes.

D. Evaluation of outcomes and impact (To what extent has the development goal been achieved?)

- It assesses impact produced from the project/program in gender disaggregated way e.g.
 - ✓ Increased economic empowerment to women
 - ✓ Reduced costs
 - ✓ Improved access to places increased income
 - ✓ Improved women status and decision making power

E. Evaluation of Sustainability

- Refers to the determination of the merit, worth, and significance of efforts to continue of a given evaluated project/program after its completion and removal of the project/program resources.
- It also signifies in maintaining, replicating, and exporting a given positive and/or unintended outcomes and impacts under specific consideration of gender sustainability.
- It relates to the project/program stakeholders ability to continue addressing gender issues even after project/program completion.
- It evaluates how well the contribution of the project/program to development efforts (human, social, economic, and environmental dimensions) is sustained in gender equitable manner.

Sustainability can be evaluated as an element in its own or as part of a more comprehensive evaluation. Sustainability is inherent in:

- ✓ Persistence of the institution in gender mainstreamed way,
- ✓ Persistence of program activities, services, interventions (this includes transferability to other contexts or replication of programming) in gender equitable manner,
- ✓ Persistence of resulting changes for individuals (humans), society (e.g., culture, institutions, etc.), economy, and the environment in gender balanced manner,
- ✓ Capacity of women to work on their own strength after the project completion,

- ✓ Link with external agencies strengthened and other involved agencies more gender sensitive.

3.4. Types of Evaluation

There are four major types of evaluation, namely; the inception evaluation, the interim or midterm evaluation, terminal or completion evaluation and post project or impact evaluation.

- i. **Inception Evaluation** is conducted after the commencement of the first year of project/program implementation. It helps to review the first period of the project/program progress.
- ii. **Interim or Midterm Evaluation** is done at the mid-way of the project/program period. This exercise helps to review the progress in terms of what are being achieved with regard to expected effects, therefore on the basis of reviews corrective measures will be taken, if need be.
- iii. **Terminal or Completion Evaluation** is generally done at the end of project/program period and it is usually taken to indicate what has been achieved by the project/program.
- iv. **Post or Impact Evaluation** is done a few years after the completion of the project/program implementation. This evaluation exercise will be conducted about 3-5 years after the project/program termination in order to evaluate the extent to which the project/program has contributed in achieving the broader national development objectives.

3.5. Who Undertakes Gender Responsive Evaluation?

There are three options for undertaking M&E responsibilities;

- ✓ Firstly contracting external evaluation personnel,
- ✓ Secondly having a mix of external and internal personal, and
- ✓ Thirdly relying on the internal staff.

In general the more external the process becomes the more objective it is likely to be. At the same time wholly external evaluation are often out of touch with the project realities and with ongoing evaluation process.

Additionally, whenever an external entity or individual is utilized, care should be taken to provide clear terms of reference and necessary documentation. Moreover, regardless of which option is employed, relevant training of those responsible for M&E operation is essential to ensure quality data collection, analysis and interpretation and action.

3.6. The Feedback Aspect of Gender Responsive Evaluation

What is Feedback?

Feedback is a process in which information about the past or the present influences the same phenomenon in the present or future. It is also defined as "information about the gap between the actual level and the reference level of a system parameter which is used to alter the gap in some way", emphasizing that the information by itself is not feedback unless translated into action.

Evaluation feedback is twofold:

- ✓ Feedback for project/program implementers and management and
- ✓ Feedback for the policy makers and the public.

1. Feedback for Project/program Management and Operation

- Feedback for project/program management and operation involves a process of using evaluation results as well as the lessons and recommendations obtained to improve planning and implementation of projects/programs in gender responsive way.
- This type of feedback can be further classified into:

i. Feedback to improve the decision-making process

- Involves direct use of evaluation results in making decisions concerning the target groups and projects/programs.
- In most cases, this process forms a part of the project/program prioritizing and management procedures,
- Similarly, the results of evaluation can be used to determine whether the project/program should be completed, extended or followed up from gender lens.

ii. Feedback for the organization's learning process

- Involves the accumulation of evaluation information and lessons by the people involved in development project/programs operations with the aim of using them in formulating and planning similar projects/programs and in reviewing organizational strategies by mainstreaming gender and integrating gender responsiveness.
- Specifically, feedback for their learning process is provided through a variety of measures as follows:
 - ✓ Debriefing meetings with the participation of stakeholders,
 - ✓ information sharing through the evaluation network mentioned above,
 - ✓ The creation of a database on lessons by thematic task teams,
 - ✓ Studies on evaluations to identify common tendencies.

2. Feedback to the Policy Makers and the Public

- Feedback to the policy makers and the public is a process to fulfill equity and accountability which is important to ensure gender equality.
- The accountability requirements include clear cooperation objectives, transparency in the organization's decision making process and efficient use of inputs, and accurate measurement of the achievements resulting from the policy in gender sensitive ways.
- Ensuring accountability demands the disclosure of evaluation information with quality that meets all of these requirements.
- The evaluation feedback has an overall entrenched effect through influencing public policy to be designed in gender responsive manner.

Gender Mainstreaming Training Manual



Chapter 8

Gender Mainstreaming in Project Cycle Management - PCM

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Chapter Introduction

Gender Mainstreaming in Project Cycle Management-PCM is committed to promote gender equality and address gender gaps in all project intervention phases so as to ensure that women and men have the same right to develop their potential and use their resources in a meaningful way. Besides, it is essential to mainstream gender in each phase of PCM to ensure sustainability of the intervention, support equitable growth and increased production.

As it is, earlier on units we examined concept of Gender, Gender Mainstreaming, Gender Analysis, Audit, Budget, Monitoring and Evaluation-M&E. This chapter familiarizes an overview of Project Cycle Management in charge of integrating gender issues at all project cycle stages.

Contents

The chapter is comprises the following sessions;

- Session One: Basic Concepts of Project Cycle Management (PCM)
- Session Two: Gender in Project Cycle Management

Objectives

At the completion of this chapter the participants will be able to:

- ☞ Understand the basic concepts of Project and Project Cycle Management,
- ☞ Provide hints for developing and implementing project from a gender-based perspective,
- ☞ Assess projects on strengths and weakness for mainstreaming gender.

Chapter Duration

- 2 Hours

Methodology

- Lecture
- Questions
- Reflection
- Brainstorming
- Group Discussions
- Case study

Required Material

- | | |
|-------------------|----------------|
| ▪ LCD Projector | ▪ Colour Paper |
| ▪ Laptop Computer | ▪ Handout |
| ▪ Flip Chart | ▪ Masking Tape |
| ▪ Markers | ▪ Sticker Note |
| ▪ Pens | ▪ Hard paper |
| ▪ Note Book | ▪ Case Studies |

Session One: - Basic Concepts of Project Cycle Management (PCM)

| | |
|----------------------------|---|
| Session One | Basic Concepts of Project Cycle Management (PCM) |
| Duration | 60 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none"> Understand the basic concepts of Project and PCM |
| Content | <ul style="list-style-type: none"> Introduction to Projects Project Cycle Management Steps of Project Cycle Management |
| Methodology | Lecture, Reflections, Group Discussions and Presentations |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 1: Brainstorming on Basic Concepts of Project and Project Cycle Management (PCM)

Step 1: The trainer will ask trainees to think and reflect on the definition of Project and Project Cycle Management-PCM and List down Projects that are implemented in their organization?

Step 2: Let them to discuss and reflect their point of view to others.

Step 3: Conclude the brainstorming using trainer's tips and note.



Trainer's Tips

A project is a series of tasks directed towards a specific outcome/goal.



Current Situation

Where we are now?
Are we currently unhappy?
Are we needed for change?

Where we don't want be!
Still unhappy!
Nothing has changed!

Where we want to be!
Achieved a desire situation!
Situation changed!
A BETTER FUTURE!



Activity 2: Group Discussion on Project Vs Work (regular)

Purpose of the activity: To stimulate participants thinking on critical experiences, knowledge and incidences that shaped their attitude and perception toward project and work.

Duration for the activity: 30 minutes

Step 1: Divide the trainees in to small groups in the way that it ensures gender balance.

Step 2: Printout the question items worksheet regarding of *Project Vs Work* that have been developed previously and distributed to each group members.

| <i>Statement</i> | <i>Work (regular)</i> | <i>Project</i> |
|--|-----------------------|----------------|
| Affect every aspect of the organization | | |
| It has start and finish | | |
| It creates something new | | |
| Incorporate list of different jobs | | |
| It starts with an idea which is turned in to something | | |
| It is not business as unusual | | |

Step 3: Let trainees to fill the question items box then discuss and reflect their point of view.

Step 4: Conclude the discussion using trainer's tips and trainer's notes.



Trainer's Tips

The main differences between project and work (regular);

| <i>Project</i> | <i>Work (regular)</i> |
|----------------------------|-----------------------|
| ➡ Temporary | ➡ Semi-Permanent |
| ➡ Definite Starts and Ends | ➡ Ongoing and No End |
| ➡ Unique | ➡ Repetitive |
| ➡ Fixed Budget | ➡ Generate Revenue |

Trainer's Note

1. Basic Concepts of Project Cycle Management (PCM)

1.1. Introduction to Project

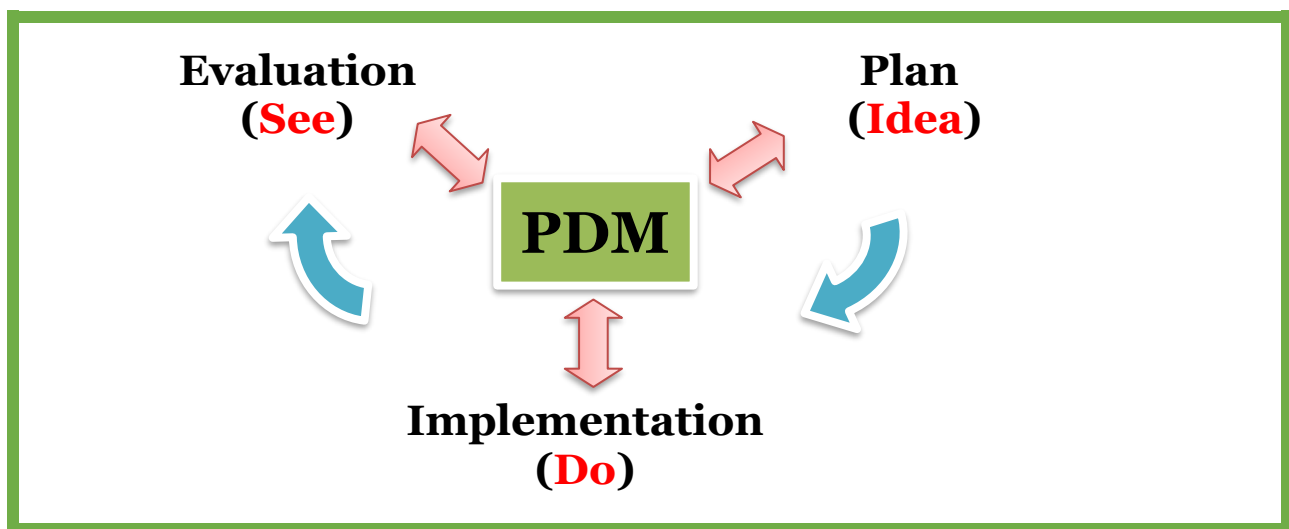
Project is an undertaking for the purpose of achieving established objectives, within a given budget and time period. It is a temporary process, which has a group of inter-related activities, constrained by time, cost, and scope, and designed to deliver a unique purpose. Usually each task has a planned completion data (due date) and assigned resources aimed to achieve goals linked to anticipated (desired) effects and impacts in a target population (sometimes called “beneficiaries”).

According to those meanings;

- A project has a beginning and an end.
- A project has limited resources.
- A project follows a planned and organized method.
- Every project is unique.
- A project has a goal and a manager responsible for its outcomes.

Project Design Matrix (PDM);

- Also called The Design Structure Matrix (DSM) is a simple, compact and visual representation of a project or system in the form of a square matrix.



The Success of a Project Depends On;

- Results-oriented – not activity driven
- Consistency and Transparency
- Logically sets objectives and actions
- Participatory stakeholder involvement
- Shows whether objectives have been achieved: Indicators (for M&E)
- Framework for assessing relevance, feasibility and sustainability
- Describes external factors that influence the project's success: assumptions and risks

Reasons Why Some Projects Fail (What Not To Do);

- Unclear objectives and Exaggerated goals
- No stakeholder consultation and not relevant to beneficiaries
- Not linked to framework and processes (inflexible)
- False expectations (optimistic goals to attract finance)
- End abruptly and usually too short term
- 'Driven' by aid professionals, not locally 'owned'
- Risks are insufficiently taken into account

1.2. Project Cycle Management - PCM

Project Cycle refers to;

- The life cycle of any project that describes different project stages and separates the planning, implementation and evaluation stages from each other.
- A logical sequence of activities to accomplish the project's goals or objectives.

Project cycles have three principles;

- The cycle **defines** the key decisions, information requirements and responsibilities at each phase.
- **The phases** in the cycle are progressive – each phase needs to be completed for the next to be tackled with success.
- The cycle draws on **evaluation to build experience** from existing projects into the design of future programs and projects.

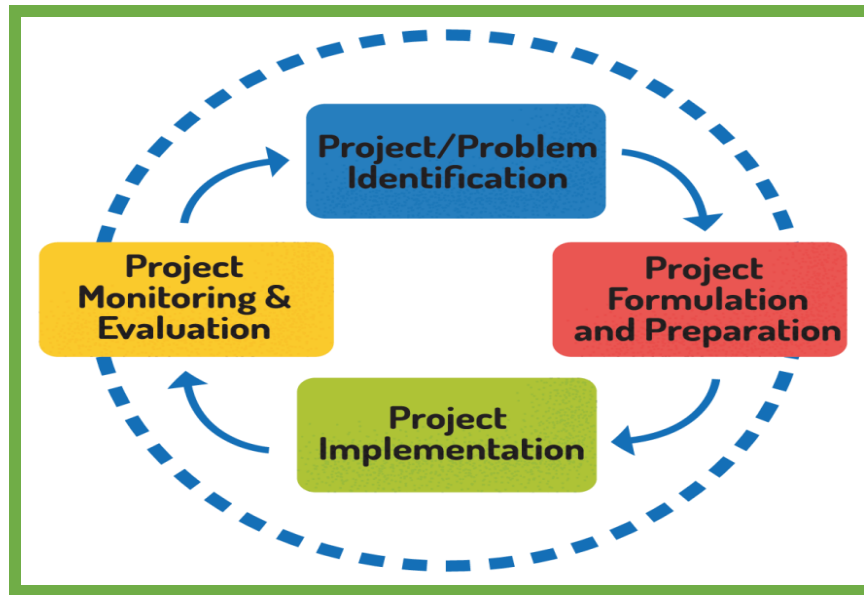


Figure of Project Cycle

Project Cycle Management is a process of leading a team, combining systems knowledge, skills, tools, and etc. to plan, implement and evaluate project activities in order to meet or exceed stakeholders' needs and expectations.

The Project cycle management should define the following aspect:

- What work need to be archive?
- Who will be involved in the team?
- What are the project deliverable?
- How monitor the performance of each phase?

1.3. Steps of Project Cycle Management

Different systems of GOs, NGOs, associations and etc. have different project phases and even different names for the phases. Each phase is also an opportunity for the project to stop and evaluate its progress before moving to the next phase in the cycle. This allows for opportunities to improve and reevaluate the assumptions the project makes. Commonly, PCM is the representation of 5 key steps which involves identification, formulation, implementation, monitoring & evaluation and reporting.

NB. Purpose, Key questions, tools and other related aspects of PCM Steps will be described in the next session of “**Gender Mainstreaming in Project Cycle Management.**”

Session Two: - Gender in Project Cycle Management (PCM)

| | |
|----------------------------|---|
| Session One | Gender in Project Cycle Management (PCM) |
| Duration | 60 minutes |
| Learning Objectives | By the end of this session trainees will be able to: <ul style="list-style-type: none"> ▪ Provide hints and guidelines for developing and implementing a project from a gender-based perspective, ▪ Assess projects on strengths and weakness for mainstreaming gender. |
| Content | <ul style="list-style-type: none"> ▪ Gender in Project Cycle Management ▪ Objectives of Gender Mainstreaming in Projects ▪ Mainstream Gender in different Steps of PCM |
| Methodology | Lecture, Reflections, Group Discussions and Presentations |
| Required Materials | Flip Chart, White Board, Marker, Computer, LCD Projector |



Activity 3: Brainstorming on Gender Mainstreaming in Project Cycle Management - PCM

Step 1: The trainer will ask trainees to think and reflect on the following;

- How do you define gender in Project Cycle Management?

Step 2: Let them to discuss and reflect their point of view to others.

Step 3: Conclude the brainstorming using trainer's note.

Trainer's Note

2. Gender in Project Cycle Management

Gender in Project Cycle Management (PCM) is integrating gender as a cross-cutting theme to strengthen the existing project planning approach and methodology.

Engendering PCM distinguishes **three levels of results**, which correspond to different spheres of responsibility and influence.

- A. **The first level** compares the **inputs and outputs** of projects.
 - ✓ **Gender inputs and outputs** are for example specific activities that aim to promote gender equality (capacity building, skills trainings, etc.)
- B. **The second level** is the principle of **results or outcomes** of the project.
 - ✓ **With respect to gender**, the outcome level aims for gender-transformative changes, such as better access to resources or income, etc.
- C. **The third level** puts the focus on **the impact** of the project.
 - ✓ **In regard to gender**, for example, reduced prevalence of violence against women would be an impact.

2.1. Objectives of Gender Mainstreaming in PCM

The overall objective of mainstreaming gender within PCM is to:

- ✓ Strengthens capacity to more comprehensively and responsively gender planning, implementation and evaluation,
- ✓ Assess project outputs, indicators, results, outcomes and impacts from gender perspectives,
- ✓ Integrate gender needs, desires and ambitions for ending gender discrimination,
- ✓ Translate findings of gender analysis into gender-responsive programming,
- ✓ Provide signal that measure gender-related changes in the society, politics, economic participation etc., and
- ✓ Increases the relevance, effectiveness and efficiency of project interventions.

2.2. Mainstream Gender in different Stages of PCM

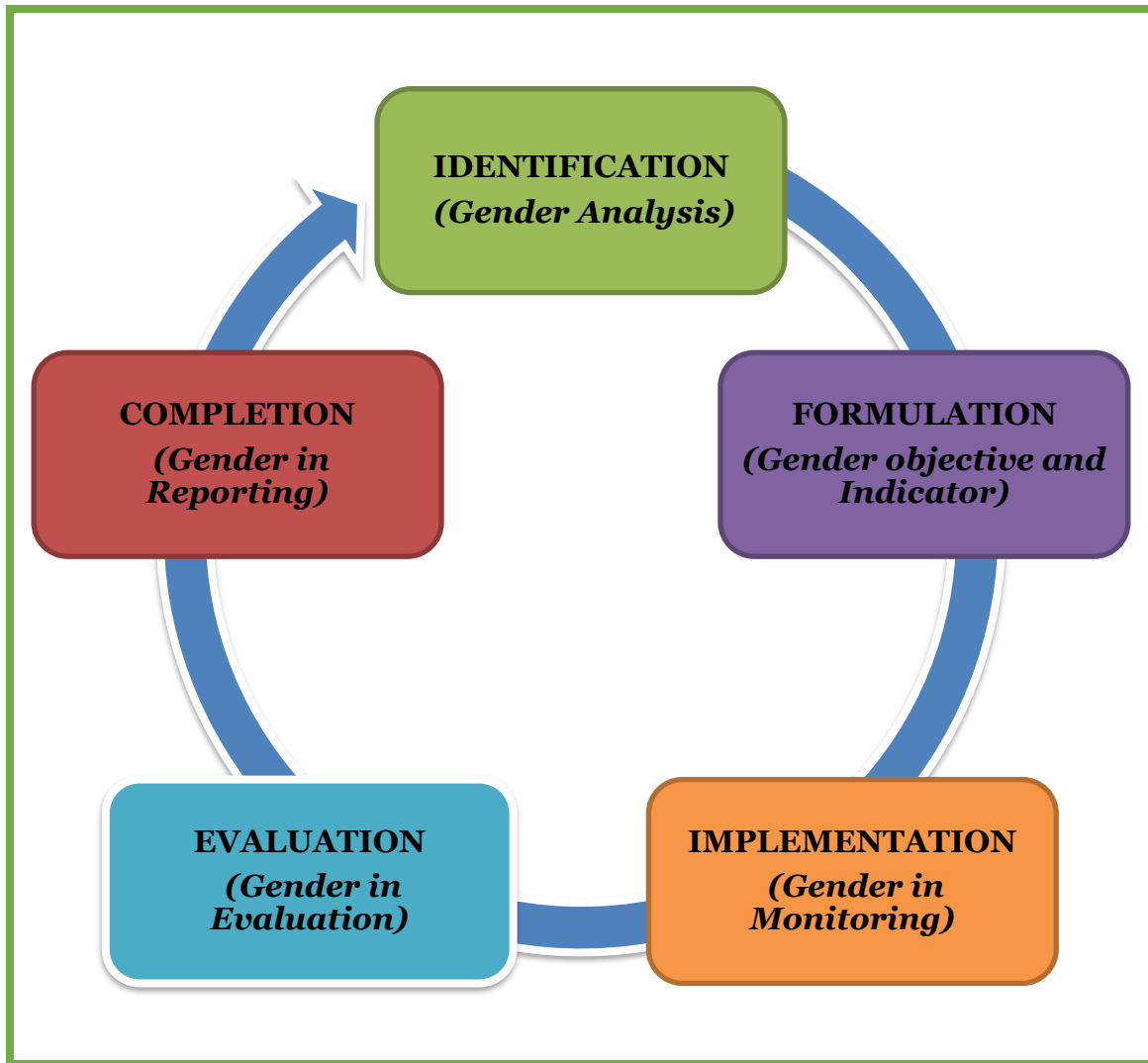
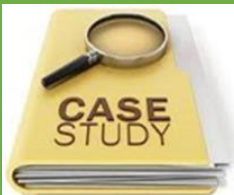


Figure where to mainstream gender in different Stages of PCM

Stage 1: Identification

The purpose of this stage is to show how the situation as it exists at the beginning of the project, before starting activities that target changes considered gender aspects.

| | <i>Some Key Questions</i> | <i>Some Key Tools</i> |
|--|--|--|
| <p>➔ <i>During Gender Analysis, Practical and Strategic gender needs are assessed.</i></p> <p>➔ <i>Gender inequalities are identified (project, program, and context).</i></p> | <ul style="list-style-type: none"> ▪ Is gender part of the context analysis and other assessments for the intervention? ▪ Are women as well as men (target groups, staff, partners) involved in the initial situation analysis at all levels (e.g. policy dialogue,)? ▪ Are organizations working specifically on gender, or with women, consulted? | <ul style="list-style-type: none"> ▪ Participatory rural appraisal, ▪ Focus Group Discussion, ▪ Household survey, ▪ Time use diary, ▪ Village and resource mapping, ▪ Social and poverty mapping, ▪ Stakeholder analysis, ▪ Risk and conflict assessment |



Activity 4: Case Study on Project Problem Identification

Instruction: the trainer will share the following cases for analysis by trainees.

Step 1: Divided the participants in to two groups and ask them to discuss & analyze the following cases:

Case 1

In one organization there are totally 763 (male 440 female 323) staffs in the office in different position. The data show that the participation of women worker is 42%. By the educational status women employees are 166 Post and undergraduate female degree holders. This shows that 51% are professional women. 5% are women in semi-skilled jobs. 44 % women are in positions that do not require skill jobs.

Case 2

There are a total of 139 leadership and decision-making positions. Women's presence in leadership starts from consultant position until team leader. There is one woman as a consultant, twelve as a director and twenty-five as a team leader. Out of a total of 139 senior and junior leaders and decision-makers, women's participation was 38 (27.3%).

Step 2: Allow trainees to present their discussion result.

Step 3: Summarized the discussion using trainer's note.

Stage 2: Formulation

| The purpose is to determine the specific activities of the project regards of gender issues. | | |
|---|--|--|
| | Some Key Questions | Some Key Tools |
| <p>➡ Gender-specific and/or gender-sensitive objectives are defined.</p> <p>➡ Quantitative and qualitative indicators are identified.</p> | <ul style="list-style-type: none"> Based on the findings of the gender analysis, what changes do we aim for our intervention? How do we translate and integrate these aspired changes into a theory of change, objectives and a result framework? What is the most effective and feasible strategy, a mainstreaming approach or a gender-specific intervention? Are women/men's constraints, needs and views, as identified in the analysis, explicit and reflected in the objectives, risk analysis and impact hypothesis of the intervention? Have quantitative & qualitative indicators been defined? Is the allocation of financial and human resources appropriate to address gender equality issues? Are key processes (e.g. dialogue between key stakeholders), procedures (e.g. Terms of Reference) and planning tools (e.g. log frame) explicit and specific on gender? | <ul style="list-style-type: none"> Baseline study, Problem tree, Impact hypothesis, Gender responsive budgeting; Gender Policy Marker checklist |



Activity 5: Case Study on Project Formulation

Instruction: the trainer will share the following cases for analysis by trainees.

Step 1: Divided the participants in to two groups and ask them to discuss on what is root cause of the problem related to formulation?

Case 1

A public bus terminal after completion was not put to use for five years due to distant location from the city.

Case 2

At micro level, a micro-enterprise project three years of project launched by a group of women under self-employment component project closed after 6 months as there was no adequate demand for the products.

Step 3: Allow trainees to present their discussion result.

Step 4: Summarized the discussion using trainer's note.

Stage 3: Implementation & Monitoring

Putting the project plan into action with respect to gender perspective.

Are you progressing toward the project goal the way you had intended?

| | <i>Some Key Questions</i> | <i>Some Key Tools</i> |
|---|---|--|
| <p>➡ <i>Sex disaggregated data is collected.</i></p> <p>➡ <i>Existing monitoring systems are engendered.</i></p> <p>➡ <i>Monitoring fields and key questions are defined.</i></p> | <ul style="list-style-type: none"> ▪ Who will implement the planned intervention? ▪ Are partners and team gender competent with necessary tools and methodologies? Are outputs, outcomes and processes being monitored? ▪ Do women and men have equitable access and control over resources - e.g. are there criteria that discriminate against women or men? Are there gender-specific obstacles? ▪ Is the project steered with a view to increasing women and men's equal benefits? ▪ Is gender integrated in the monitoring system, and how? Are changes in gender relations reported as part of monitoring? Are additional gender-specific monitoring fields required? | <ul style="list-style-type: none"> ▪ Baseline Survey ▪ Time use diary ▪ Focus Group Discussion ▪ Benchmark tracking, ▪ Feedback mechanisms, ▪ Audio-visual documentation |



Activity 6: Group Discussion on Project Implementation

Step 1: Divide the trainees in to small groups in the way that it ensures gender balance.

Step 2: Let trainees to discuss and reflect their point of view on the following questions.

- What the common challenges can be faced during project implementation?
- What should be done to overcome the challenge?

Step 3: Allow trainees to present their discussion results.

Step 4: Summarized the discussion using trainer's note.

Stage 4: Evaluation

| Are you progressing toward the project goal the way you had intended so as to engender? | | |
|---|---|--|
| <ul style="list-style-type: none"> ➡ Gender questions are included in the ToR/ evaluation plan. ➡ Quantitative and qualitative data are analyzed which measure relevance, efficiency, effectiveness, impact and sustainability of the gender intervention strategy against initial gender objectives and indicators. ➡ Key stakeholders, strategic partners, and primary target group are engaged through participatory evaluation approaches. | Some Key Questions | Some Key Tools |
| | <ul style="list-style-type: none"> ▪ Are collected data on the immediate and/or longer-term effects of the project? ▪ Have risks and stereotypes of structural barriers preventing full participation of women or men been considered? ▪ Are new gender issues emerging within the project? ▪ Are there (unintended) negative effects of the project on gender? ▪ Are there new external and contextual factors/actors supporting or impeding gender equality that are relevant for the project? ▪ Are women/men supportive of the program or do they wish to change it (partly/totally)? Who? Why? How? Reference and planning tools (e.g. log frame) explicit and specific on gender? | <ul style="list-style-type: none"> ▪ Primary target surveys ▪ Impact assessment ▪ Stakeholder consultation, ▪ Public reviews and ▪ Audits ▪ Comparative analysis |



Activity 7: Group Discussion on Project Evaluation

Step 1: Divide the trainees in to small groups in the way that it ensures gender balance.

Step 2: Let trainees to discuss on the following questions.

- Are women involved in the monitoring and evaluation?
- What indicators are there to measure progress in achieving goals and benefits?
- Is data collected often enough so that adjustments can be made during the project?

Step 3: Allow trainees to present their discussion results.

Step 4: Summarized the discussion using trainer's note.

Stage 5: Reporting

The process can help to identify gender equality issues and put action plans in place.

| | <i>Some Key Questions</i> | <i>Some Key Tools</i> |
|---|---|---|
| <p>➡ <i>Gender is included in the context analysis.</i></p> <p>➡ <i>Gender outputs, results and outcomes are analyzed and reported on (achievements, challenges, good practices, lessons learnt)</i></p> <p>➡ <i>Gender in the organization is assessed and reported on promoting both accountability and learning.</i></p> | <ul style="list-style-type: none"> ▪ Are gender results systematically integrated in all parts and levels of reporting? ▪ Are «best – and bad – practice» on gender mainstreaming analyzed and disseminated? ▪ Has a learning and knowledge management strategy been developed for internal reflection, capacity development and capitalization of good practices and lessons learnt? (learning) ▪ Has a feedback mechanism toward the primary target group and key stakeholders been jointly developed and agreed? ▪ Has a communication strategy been developed for informing various publics about the progress and results of the project from a gender perspective? | <ul style="list-style-type: none"> ▪ Case studying, ▪ Target group voice: most significant change; quotes; photo-stories, ▪ Gender Annual Reporting Check list and, ▪ Gender Reference Indicator Guideline. |



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