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Gender-responsive Project Management

A Practical Guide

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Abbreviations and acronyms

AAA	Accra Agenda for Action
AIDS	Acquired Immune Deficiency Syndrome
BMZ	German Federal Ministry for Economic Cooperation and Development
CEDAW	UN Convention on the Elimination of All Forms of Discrimination Against Women
CSO	Civil Society Organisations
CSW	Commercial Sex Workers
DFID	UK Department for International Development
EO	Equal Opportunity
EU	European Union
GAP	World Bank Gender Action Plan "Gender Equality as Smart Economics"
GIA	Gender Impact Analysis
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH
GTZ	Deutsche Gesellschaft für Technische Zusammenarbeit GmbH
GOPP	Gender-Oriented Project Planning
HIV	Human Immunodeficiency Virus
ICMPD	International Centre for Migration Policy Development
IGWG	Inter Agency Gender Working Group
MDGs	Millennium Development Goals
NGOs	Non-governmental Organisations
NORAD	Norwegian Agency for Development Cooperation
OECD/DAC	Organisation for Economic Co-operation and Development/Development Assistance Committee
PD	Paris Declaration on Aid Effectiveness
PLWHA	Persons Living with HIV/AIDS
RBM	Results-based Management
SDC	Swiss Agency for Development and Cooperation
STIs	Sexual Transmitted Diseases
ToR	Terms of Reference
UNDP	United Nations Development Programme
WHO	World Health Organisation

Introduction

"Strengthening women's rights changes things for the better – for both women and men. Gender equality and empowered women are not only development goals but are also powerful catalysts for multiplying development efforts." (OECD/DAC 2010)

Gender as a prerequisite for sustainable development

Gender equality and non-discrimination on the basis of sex are fundamental human rights, recognised by a number of international legal instruments and declarations and enshrined in most national constitutions. It is increasingly recognised that development interventions are more likely to succeed when the socio-economic context, including the gender dynamics, in which they operate is taken into account. The rationale for addressing socio-economic and gender issues in project management is to promote sustainable development and poverty reduction. *"The promotion of gender equality and women's rights is not only crucial in itself but is a fundamental human right and a question of social justice, as well as being instrumental in achieving all the Millennium Development Goals and the respective objectives of the Beijing Platform for Action, the Cairo Programme of Action and Convention on the Elimination of All Forms of Discrimination Against Women."*[1] Hence, gender equality and non-discrimination have to be integrated and reflected upon throughout the project cycle of any development intervention.

Operational guidance for the integration of gender

Different aspects regarding the integration of gender in the project cycle are presented in this working document. The aim of this document is to give operational guidance on how to integrate gender in any type of project or programme, independent from its specific sector or scope. The guide targets GIZ development practitioners wordwide It reflects also international experiences and therefore incorporates methodological frameworks and approaches from different donor and civil society organisations. The selected approaches and instruments are intended to support development practitioners to successfully integrate and mainstream gender into development interventions.

Gender approach as a frame of mind

It should be stressed, however, that the integration of a gender approach is not just a matter of simply using the right tools. Rather it requires a certain frame of mind, or a way of thinking. Once this way of thinking is developed and applied, gender mainstreaming and strengthening women's rights becomes an integral part of development work.

This guide builds upon the GIZ publications *Gender-Differentiation throughout the Project Cycle* (1995), *Gender and Project Management* (2000) and *Steps for Action to Promote Gender Equality* (2009). It draws upon several theoretical perspectives and methods, including project cycle management, the logical framework, rapid appraisal techniques, participatory approaches, gender analysis and stakeholder identification.

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[1] Joint statement by the Council, the representatives of the governments of the Member States meeting within the Council, the European Parliament and the Commission on European Union Development Policy (2006): 'The European Consensus' (OJ 2006/C 46/01), para. 9. Brussels.

Some of tools have been adapted and organised according to the five success factors, namely strategy, cooperation, steering, processes and learning and innovation, identified in the *GIZ Management Model for Sustainable Development, Capacity WORKS*. However, the publication presents a generic project cycle. The user is invited to customise the approaches and instruments to suit the specific cultural and sectoral context in which they are being used.

The guide follows the structure of the project cycle and introduces approaches and key questions as part of each respective chapter on the different phases of the cycle, namely analysis, planning, implementation and monitoring and evaluation. Each chapter includes important action points to be considered as well as relevant key questions.

Chapter 1 introduces the rationale as well as the basic principles, elements and questions for the integration of a gender approach throughout the project cycle.

Chapter 2 looks at gender analysis as a prerequisite for the integration of a gender perspective into development interventions.

Chapter 3 deals with planning in the project cycle and outlines how best to integrate a gender perspective into strategic planning processes. Since budgets are usually defined during the planning process, this chapter includes some fundamentals for gender-responsive budgeting.

Chapter 4 tackles principles and practical steps for the integration of a gender approach during the implementation process. Since implementation should foster learning for all stakeholders involved and cater for innovative approaches, these aspects are included in this chapter.

Chapter 5 describes essential elements for gender-responsive monitoring and evaluation. Monitoring is implemented during the implementation phase; however, as the approaches and instruments are analogue to the approaches and instruments used for evaluation, monitoring and evaluation are consolidated in this chapter. The chapter wraps up the publication by showing how to mainstream gender into these processes.

The annex contains all relevant terms used in the publication and lists recommended readings. Different instruments and tools to support the integration of a gender approach into the project cycle are compiled in the annex. However, the selection of instruments does not claim to be comprehensive. We would like to invite the reader to share their experiences and instruments in order to enhance mutual learning and to make them available to colleagues.

1. Gender-responsive project management

Employing a gender approach in development interventions means focusing on the structural causes of discrimination based on sex and/or gender, thereby aiming at gender equality. It means to constantly identify and understand the different roles and entitlements of women and men, and the specific challenges faced by disadvantaged groups. Existing imbalances between those who *do the work* and those who *control the benefits* will prove unsustainable in the long run. This holds true at household, community and national and international level. Hence, development interventions that do not take into consideration the differing needs of men and women and their social, economic, and cultural realities during all phases of the project cycle run the risk of being ineffective, inefficient and unsustainable.

International framework

All signatory states to the 1979 Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) have recognized human rights and are committed to gender equality and the promotion of the status and the rights of women. CEDAW and the Beijing Platform for Action (1995) are particularly relevant agreements that commit countries worldwide to foster gender equality and follow the principle of non-discrimination. The 2000 Millennium Development Declaration and Millennium Development Goals (MDGs) emphasise the importance of gender equality for economic growth, poverty reduction and sustainable development.

Gender and new aid modalities

Box 1: Gender and new aid modalities – Framework for gender-responsive project management

Since the Millennium Development Goals (MDGs) in 2000, the Paris Declaration on Aid Effectiveness (PD) in 2005 and the Accra Agenda for Action (AAA) in 2008 as well as the Busan Gender Action Plan 2011, there has been tangible progress to improve the international aid system. However, several evaluations reflect that the new aid modalities have made work on the empowerment of women and gender equality more difficult. This is also seen in the declining interest in and support for "gender machineries" in developing countries, and threats of reductions in support for women's organisations. At the same time, several evaluations and analytical reports have pointed out that the new aid modalities present new opportunities for work on gender equality and gender mainstreaming. Budget support and harmonization of development cooperation provide opportunities to lift gender equality into central policy and, not least, into the finance and planning ministries as well as the sector ministries[2]. However, for these reforms to have the desired impact, it is critical that gender equality and women's empowerment are adequately analysed and captured in the evolving new approaches to aid delivery and partnership. Without due consideration and appropriate concrete measures in design of new aid modalities and processes there is the risk that they may serve to reinforce rather than address existing gender inequalities.

Many of the key questions and entry points for the integration of a gender approach in projects and programmes can be used to embed gender equality in the mechanisms and measures being developed in the framework of new aid modalities.

[2] NORAD (2006): Lessons from Evaluations of Women and Gender Equality in Development Cooperation. Oslo

Framework for German development cooperation

Equal rights, equal duties, equal opportunities and equal power for women and men are basic principles of German development policy. In its Gender Equality Strategy (2001), the German Federal Ministry for Economic Cooperation and Development (BMZ) declares the promotion of gender equality a cross-cutting issue across all areas of German development cooperation. The BMZ Gender Action Plan 2009-2012 defines principles and thematic priorities for action for gender equality. The assumption is that there is no gender-neutral reality. All decisions and interventions – intended or unintended – (can) have different implications for men and women, boys and girls. Germany's development policy therefore pursues a dual approach of mainstreaming a gender approach and gender-specific activities and affirmative action to reach its goals.

Dual track approach

Gender mainstreaming

Gender mainstreaming is the process of assessing and considering the concerns and implications for women and men as an integral part of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres. The goal is that women and men benefit equally, and inequality is not perpetuated.

Gender-specific activities and affirmative action

Gender-specific activities and affirmative action is undertaken whenever women or men are in a particularly disadvantageous position. Gender-specific interventions can target women exclusively, men and women together, or only men, to enable them to participate in and benefit equally from development efforts.

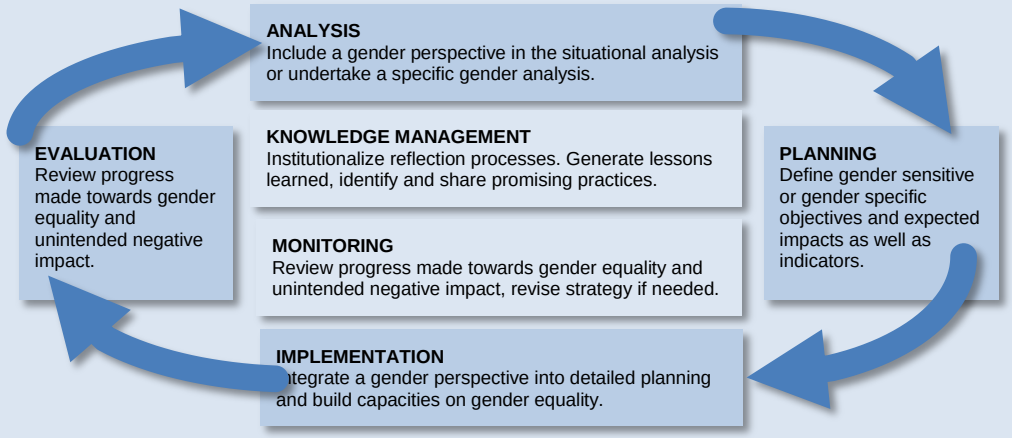
Shortcomings and opportunities

In order to follow the dual track approach, a body of knowledge and expertise and many tools have been developed to facilitate the consideration of gender in development interventions. However, shortcomings remain: cross-cutting issues such as gender, poverty, human rights and environment are often included solely as an afterthought and only tackled as separate and mutually exclusive categories. Recommendations from evaluations point out that a lack of clear goals to promote gender equality in development cooperation and of strong leadership on women's rights and gender equality as well as more resources are a prerequisite for the coherent and continuous incorporation of a gender approach.[3] In contrast, if gender issues are considered in the strategic planning phase while drawing up the general concept, they can be more easily incorporated into interventions' design, implementation, monitoring and evaluation. The gender approach also has to be reflected in budgets. It has to be ensured that resources benefit both men and women equally or disadvantaged groups specifically.

The incorporation of a gender approach is crucial at all phases of the project cycle, which is illustrated in the diagram below:

[3] See for example NORAD (2006): Lessons from Evaluations of Women and Gender Equality in Development Cooperation. Oslo.

Figure 1: Gender in the project cycle



Gender analysis

The first phase, usually preceding a development intervention, is the analysis of the framework conditions and the assessment, if the underlying understanding of the problem is correct and captures the diverse realities of the target groups. Such an analysis has to incorporate gender-specific needs and interests.

Gender in the planning phase

The second phase is the strategic planning of the project or programme, its outputs, use of outputs and outcomes and the definition of feasible indicators to measure the success of the development intervention. Such indicators have to be gender-disaggregated and reflect the achievements to be made towards gender equality.

Gender in the implementation phase

The third phase is the implementation of the project. In this phase, the strategic planning is operationalised. Gender equality and the principle of non-discrimination have to be incorporated and monitored throughout all activities and in all strategies.

Gender in monitoring

Monitoring has to consider the positive and negative impact made on gender equality. If necessary, adjustments have to be made to avoid any negative impact on gender equality. The basic prerequisites for monitoring are set in the planning phase; the implementation of the monitoring system is included in the implementation phase and facilitates the evaluation. Monitoring is a prerequisite for the effective steering of an intervention and supports organisational learning and individual learning. Lessons learned will be incorporated in future analyses.

Knowledge management on gender

Knowledge management should take place throughout the project cycle. It implies constant reflection to generate lessons learned and to identify and share promising practices on how gender equality and non-discrimination can best be enhanced.

Gender in evaluation

The fourth phase, evaluation, means to assess the level to which the defined outputs, the use of outputs and outcomes have been achieved and to review the progress made in terms of gender equality. This serves for learning and innovation and increases the legitimacy of development interventions. Lessons learned and promising approaches identified during the evaluation should be processed and disseminated. Recommendations and perspectives should be developed in order to sustain positive outcomes of the intervention.

Box 2: Key questions for integrating gender in development interventions

The following overview introduces key areas and questions for the integration of gender throughout the project. The following chapters will provide concrete insights in which project phase which question should be considered.

- Background and justification: Is gender part of the situational analysis for the development intervention? How do gender relations impact the problem to be addressed? Were the perspectives, needs and interests of different target groups analysed and considered?
- Objectives: Does the objective of the proposed intervention reflect the needs and interests of both men and women? Does it seek to address gender issues and gaps through addressing practical needs of men and women? Does it seek to address strategic gender needs by transforming the institutions and policies (social and other) that perpetuate gender inequality? Should we focus on gender mainstreaming, gender-specific action or both?
- Target groups: Except where interventions specifically target men or women as part of a gender specific programme, do women as well as men benefit from the programme?
- Activities: Do the activities relate to the gender-responsive objectives? Do planned activities involve men and women? Are any additional activities needed to ensure that a gender perspective is explicitly integrated (e.g. gender training, additional research, etc.)?
- Indicators: Have indicators been developed to measure progress towards the fulfilment of each objective? Do these indicators measure the gender aspects of each objective? Are indicators sex disaggregated or specific? Are targets set to guarantee a sufficient level of gender balance in activities (e.g. quotas for male and female participation)?
- Implementation: Who will implement the planned intervention? Do the partners have tools and methodologies for gender-sensitive or gender-transformative implementation? Will both women and men (professionals and target groups) participate in implementation?
- Monitoring and evaluation: Does the monitoring and evaluation strategy include a gender perspective? Will it examine both content and process of the intervention? Does it involve quantitative as well as qualitative elements?
- Risks: Have stereotypes or structural barriers preventing full participation of women or men been considered? Has the potential negative impact of the intervention been considered (e.g. potential increased burden on women or social isolation of men)?
- Budget: Have financial inputs been checked to ensure that both men and women will benefit from the planned intervention? Has the need to provide gender training or to engage short-term gender experts been included in the budget?
- Partners: Are stakeholder for gender equality (governmental and non governmental) included as collaborators?
- Capacity development: Are the partner institutions gender competent? Have plans been made to ensure the capacity of partners to work on gender?
- Reports and annexes: Do the reports reflect the gender approach? Are relevant research papers (or excerpts) on gender included as references or as annexes?
- Learning and innovation: Has a communication strategy been developed for informing various publics about the existence, progress and results of the project from a gender perspective? Are we informed about the experiences of others in the field?

Adapted from: SDC (2003): Programmes/Projects. Zurich.

2. Analysis – Creating a sound basis

Gender analysis before planning

Experience shows that development interventions are more effective and sustainable when social relations, including gender, are taken into account. Otherwise they tend not to reach their objectives or even create unintended negative impacts. Hence, in order to conceptualize and implement development interventions more effectively, gender should be reflected in country, sector and community analyses. A gender analysis should be undertaken before the concrete planning process so that the findings can be reflected in the further conceptualisation and implementation of interventions. If no gender analysis had been conducted it should be undertaken as early as possible during the implementation in order to avoid a possible negative impact the development intervention might otherwise have on gender relations.

Consequences of an inadequate gender analysis

Box 3: Consequences of an inadequate gender analysis

In a natural resource management project in Niger, windbreaks were set up in order to prevent erosion. When the project was designed it was not taken into account that small ruminants are an important source of income for women in the region. The windbreaks divided up their grazing grounds and thus entailed a de facto loss of income for the women. The fields are protected, but the impacts of the project on women were mostly negative, especially since they were not even able to use dead wood from the windbreaks as fuel wood. The level of motivation of women to participate in the setting up and care of windbreaks was thus naturally low. A gender-sensitive target group analysis could have identified the problem beforehand.

Source: GIZ (2000): Gender and Project Management. Eschborn.

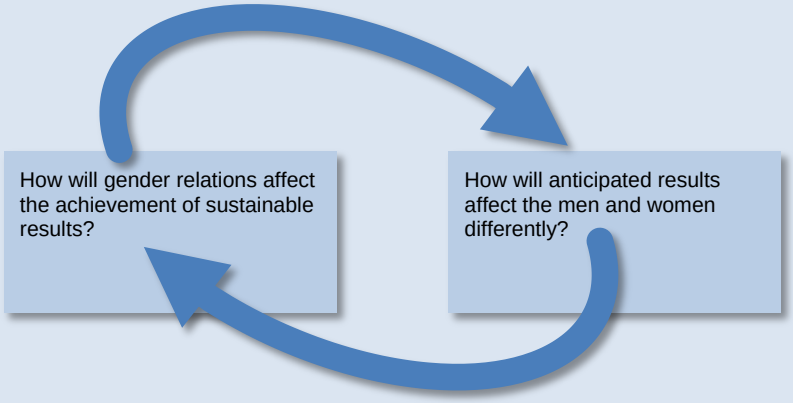
Purposes of gender analyses

A gender analysis is a systematic examination of the particular situation and roles of women and men within their economic, legal, political, social and cultural context. Gender analyses serve various purposes, as follows:

- Analyse gender patterns: Understand social roles, division of labour, access to and control over resources, legal framework.
- Review gender-specific priorities: Identify restraining and driving forces for the realisation of gender equality.
- Recommend action: Identify how practical gender needs and/or strategic gender interests should be addressed and how to avoid negative impact. Recommended actions should support the effectiveness and sustainability of development measures.
- Raise gender *awareness*: Increase understanding of gender relations and their implications.

Two basic questions – for which a set of underlying questions will be introduced throughout the publication - need to be considered for the gender-responsive implementation of projects and programmes throughout the project cycle. These are reflected in the gender analysis circle.

Figure 2: Gender analysis circle



Gender analysis circle

A gender analysis can be applied to different societal levels, such as the household, the community, the nation state or to a particular sector or development issue (energy, transport, HIV/AIDS, conflict prevention, etc.). In addition, organisations and their capacities can be analysed with a gender focus. While the former focuses on gender as an integral aspect of the intervention, the latter looks at the structures within the implementing agency or project team.

Different analytical level

In general, however, two intertwined approaches to gender analysis exist: Gender can be integrated as a cross-cutting theme in a general sit*uational or organisation*al analysis or a separate gender analysis is conducted. There are different instruments, which can be adapted or complemented and used for gender analyses, such as target group analysis, stakeholder analysis, analysis of strengths, weaknesses, opportunities and threats.

Integrate gender into situational analysis or conduct separate gender analysis

Box 4: Analytical frameworks for a gender analysis

Analytical frameworks for a gender analysis

Different analytical frameworks are available which are useful to inspire thinking. Ultimately, gender analysis frameworks are most useful when they are developed to suit a particular context and local dynamics. However, all analytical frameworks, in one form or another, cover the following topics:

- The gendered division of labour (gender roles and responsibilities)
- Women's and men's access and control over resources at all levels
- Women's and men's practical gender needs and strategic gender interests.

Consider multiple identities of women and men

Since women and men often have different roles in accordance with specific societal and cultural contexts, they often have different priorities, needs and interests which must be taken into consideration. However, women and men should not be conceptualized as homogenous groups. Instead, a gender analysis has to take various socio-economic factors into account, such as age, ethnicity, religion or socio-economic status, to capture multiple discriminations and vulnerabilities.

Practical needs and strategic interests

Box 5: Practical needs and strategic interests

The distinction between practical needs and strategic interests is useful to identify effective short- and long-term measures to enhance gender equality.

- *Practical needs are related to the concrete living conditions of women and men* and their present workloads and refer to the immediate needs, e.g. the need for clean water supply, credit schemes or fuel for cooking. These are usually addressed through short-term development interventions. They are in themselves unlikely to challenge the underlying reasons for unequal aspects of gender relations.
- *Strategic needs or interests aim to reduce existing disparities and to enhance gender equality*. These may include equal access to decision making power, land ownership, shared responsibility between men and women for child care, abusive cultural practices such as female genital mutilation (FGM) or the abolition of violence against women.

While these two analytical categories of needs are useful, in practice they often overlap. For instance, solving practical problems such as increasing women's income can at the same time strengthen their self-confidence, give them greater independence and thus contribute to a change in relations between women and men. The practical need to enhance women's basic numeracy and literacy skills in order to operate in the local market may bring the longer-term strategic advantage of enabling them to participate more effectively in community organisations. On the other hand, there are dangers in supporting projects that address practical needs, for instance, income, in ways, which do not take strategic needs into account. Thus projects or programmes, which support income-generating activities without components for accounting skill enhancement, management of organisations, and control over primary resources, would ultimately deprive women of control over the benefits of the project

Adapted from: Moser, Caroline (1993): Gender Planning and Development. London.

Collect data for gender analysis

The precise set of data needed for an analysis depends very much on the sector, as well as the cultural and country context. This fact notwithstanding, a meaningful analysis requires sufficient, relevant, precise and disaggregated data. The availability of gender-disaggregated data disaggregated by sex is crucial when conducting a gender analysis or integrating gender into a general analysis. Sometimes primary data collection – the data is collected by the investigator during the research – is necessary. However, sometimes data will already be available and existent analyses conducted by other implementing agencies or institutions can be consulted and used, rather than duplicating efforts (secondary data). However, all data relating to individuals should be collected, presented and analysed disaggregated by sex.

Many national organisations (women's organisations, CEDAW committee, research institutions,) and national reports (MDG reports, academic reports, and poverty reduction strategy papers) provide solid data at the macro level. However, information on the impact and social processes of development interventions, especially gender-disaggregated information, is often lacking. While some quantitative information is often provided (e.g. financial or physical progress), qualitative information (e.g. the impact on women's incomes, increase in women's control over assets) often needs to be newly generated.

In accordance with the process of donor harmonization, data should be shared with partners and other donors. This can be the initial start for harmonizing monitoring and

evaluation systems. Since the data was jointly produced between partner countries and donors, it strengthens the sense of ownership by partner countries. (Adapted from and complemented: GIZ (2010): Steps for Action to Promote Gender Equality. Eschborn.)

Aspects to consider while integrating gender into a general analysis

There are several aspects to be considered while integrating gender into a general analysis:

- Ensure gender expertise in the research team. Gender experts may need to work with and build capacities of research teams if they are not yet gender competent.
- Clearly request gender disaggregated information (qualitative and quantitative) in terms of reference (ToR) and be specific about the gender information that is needed.
- Refer to existing data and analyses whenever these are available.
- Revise the analytical framework to be applied (see Box 4) and methods of data collection (e.g. community and household surveys, participatory research, stakeholder analysis) to adjust questions or indicators with a gender perspective and/or create new gender specific ones.
- Ensure the participation of women and men in the consultation, who represent different relevant groups according to age, income, different household structures etc. If possible, include both women and men in the research team (depending on the cultural context) to facilitate access to both women and men in the groups targeted in the analysis as well as reflection of topics relevant to both women and men.
- Facilitate the free expression of their respective needs (e.g. talk to women and men separately).

Aspects to be considered while conducting a separate gender analysis

At times, it is necessary to carry out a specific gender analysis to complete a prior diagnostic and/or when specific gender data is needed for a particular geographical area, sector or programme. Such an analysis should consider the following aspects:

- Define the focus and tools of the gender analysis together with partners and staff.
- Refer to existing data and analyses whenever these are available.
- Ensure gender competences (internal and/or external) of the analysts.
- Ensure the participation of women and men in the consultation, who represent different relevant groups according to age, income, different household structures etc. If possible, include both women and men in the research team (depending on the cultural context) to facilitate access to both women and men in the groups targeted in the analysis as well as reflection of topics relevant to both women and men.

Key questions for a gender analysis

Box 6: Key questions for a gender analysis

To ensure the relevance of the information and to give a gender analysis a realistic scope the key question to consider is “What do we need to know to ensure that policies and development interventions address the existing needs of women and men and benefit both women and men?” Subsequently, the following sub-questions are relevant in order to answer the key question:

- How do existing structural patterns (demographic, economic, legal, and

institutional) impact the development intervention?

- How are needs of both women and men reflected in the relevant policies, national plans, sector programmes and implementation programmes?
- Who may benefit directly from the development intervention? This question needs to be answered for the (direct and indirect) target group, intermediaries and (implementing) partners.
- Can specific measures (e.g. in the methodological approach) be identified to ensure equal participation of women and men?
- What gender related risks and unintended effects could the intervention have? Who might lose directly or indirectly as a result of the development intervention? Again to be answered for the abovementioned groups in order to understand possible resistance beforehand.
- Who is the target group and may participate in and contribute to the intervention? What consequences can this participation have (at a social and/or economic level)? How can it be ensured that men and women derive equal benefit from the intervention?
- Who could be intermediaries? Who should be involved in steering and decision-making of the intervention? Is the topic structurally anchored in the partner organisation(s)?[4]

Organisational analysis

As mentioned, gender can be integrated in a sectoral or organisational analysis. Since an organisation has its own institutional culture, values and experiences –and taboos– it therefore never is gender neutral. The way gender is anchored institutionally is greatly influenced by the organisational identity and culture. The implications of integrating gender in organisations are thus complex and multi-layered: it is a political issue since it is about power relations and it is a personal issue, since everybody is influenced by gender roles and relations. Mainstreaming gender within an organisation or institution therefore requires tools and know-how – and therefore it also is a technical and a human resource development issue.

For the integration of a gender approach, it is essential to assess, and if necessary enhance, the gender capacities of the implementing and collaborating organisations. That way it can be assessed, how the institutional framework for the implementation of a gender approach looks like. Is it supportive and favourable? Is it obstructive? How can potential obstacles be addressed? Are additional capacities needed? When asking partners to integrate a gender perspective and promote gender equality, it should be mentioned that it may appear hypocritical and counterproductive to promote gender with partners and in its programmes without practicing it internally. Hence, we should also be aware of gender pattern in the own institutional or team setting. In order to see to which extent and in which areas specifically support would be necessary and entry points can be identified, an organisational/institutional analysis should be carried out. Such an analysis can either be undertaken during the analytical phase as a preparatory process or as a starting point for organisational development processes during the implementation phase. An organisational analysis involves the

[4] For further information, please refer to GIZ (2011): Gender analyses. A manual for the gender-differentiated design of technical cooperation projects and programmes. Eschborn.

assessment of how gender is integrated into different organisational elements (see Annex).

Figure 3: Framework for an organisational gender analysis

Organisational culture

Organisations evolve within national/ regional cultures and are influenced by them. But they are also influenced by the profiles of the staff, their personal and professional beliefs, their mandates, funders etc. Organisational cultures are made of complex and intangible conditions and factors, which need to be deciphered as part of a gender assessment. It is hypocritical and not efficient to promote gender in programmes and projects and to ignore it inside organisations in areas such as human resource management. Practical and strategic needs of women and men must be identified as part of a gender organisational assessment.

Technical capacities and attitude

Building the gender competence and awareness of all stakeholders at all levels is crucial. Capacity building for gender should be seen as part of programme development and use existing budgets as much as possible. Different training approaches, focusing only on the professional context and allowing a more personal reflection, are useful to make gender a matter of attitude and not only skills. All staff is responsible for integrating gender whatever level they work at.

Accountability and tools

Mechanisms, procedures and standards are needed to increase the accountability towards gender equality.

Even illustrations and language have to be reviewed so they do not stereotype gender relations. Tools and procedures often need to be revised to provide better gender disaggregated qualitative and quantitative data. Sometimes new ones need to be created.

Political will and budget

The extent to which gender is included in the policies of an organisation is a strong indicator of whether and how gender mainstreaming is being done. So is the level of gender commitment of leadership in management and the translation of it into practice. The participation of women and men in policy formulation and decision-making is also a useful indicator as women and men enrich the process with different points of views, needs and sensitivities.

Source adapted from Gender Interaction and SDC (2003): Gender in Organisations, Zurich.

Key questions to assess gender in organisations

The framework has been translated into key questions to assess gender in organisations.

Box 7: Key questions to assess gender in organisations

Organisational elements to consider	Key questions to assess gender
Political will and budget	■ Is there a gender policy? How is it monitored? ■ Is gender integrated in other policies? How is this done, monitored? ■ How do external factors (e.g. funders) influence gender in the organisation? ■ Is management leadership explicitly committed to gender? How is this translated in practice? ■ Do accountability mechanisms exist to set standards and mechanisms which strengthen the implementation of gender in different sectors and organisational levels? ■ What role do women and men play in policy formulation and decision-making? ■ What per cent of programme/project budgets are allocated for mainstreaming gender? ■ What per cent of programme and human resource development budgets is allocated to gender mainstreaming? ■ What are “gender budgets” used for? Who benefits most from “gender budgets”? ■ How are budgets reviewed for their gender sensitivity? How are they monitored? ■ How is gender budgeting included in policy dialogue and dialogue between partners?
Technical capacities and attitude	■ Who in the organisation is gender competent (women/men, with what level of responsibility, in which sectors etc.) and what is their level of competence? ■ What specific skills and tools do staff need to carry out their job in a gender aware way? ■ What existing capacity-building initiatives include gender, e.g. gender network? Which could include it? ■ Which trainers are gender competent? ■ What incentives are there to motivate staff to be (more) gender competent? ■ Which staff have gender included in their job description? ■ Are the consultants/external experts the organisation works with gender competent? ■ Does staff responsible for gender have terms of reference, skills, resources, incentives and management support? ■ How are they involved in policy and/or programme planning?

	▪ What mechanisms ensure the sharing of gender lessons within the organisation and with others (e.g. networks)? ▪ What mechanisms ensure the performance of gender responsible staff and gender advocacy competence?
Accountability and tools	▪ Do existing procedures and tools include/reflect a gender perspective and how? ▪ What initiatives have been taken so far to engender tools and procedures? ▪ What guidelines are available to staff to help them transform their existing tools and procedures, or create new ones? ▪ What additional tools and procedures exist for the integration of a gender approach?
Organisational culture	▪ How does information flow in the organisation, formally or informally? To what extent do these "flows" include women as well as men? ▪ What are the main shared values of the organisation? How do these relate to gender equality? ▪ Is decision-making centralized or decentralized? To what extent do individual women and men have access to it? ▪ What is the attitude towards female/male staff? ▪ To what extent are certain practices (e.g. working late) valued and do they discriminate against women/men? ▪ What is the incidence/perception of sexist remarks, sexual harassment? ▪ What is the current gender balance of staff in different posts? ▪ Is gender a criterion in the selection of partners, consultants, staff – women/men (how)? ▪ What working conditions/requirements may discriminate against the employment of women/men in certain jobs/posts? ▪ Is being a woman, or a man, considered an advantage or an inconvenience for certain jobs/tasks? ▪ Are different needs of women and men taken into account (e.g. access to flexible work-time arrangements when parenting (for both), acceptance of parental leave for both, sanitary arrangements etc.)?

Adapted from: SDC (2003): Gender in Organisations. Zurich.

3

3. Gender-responsive strategic planning – Mapping the road

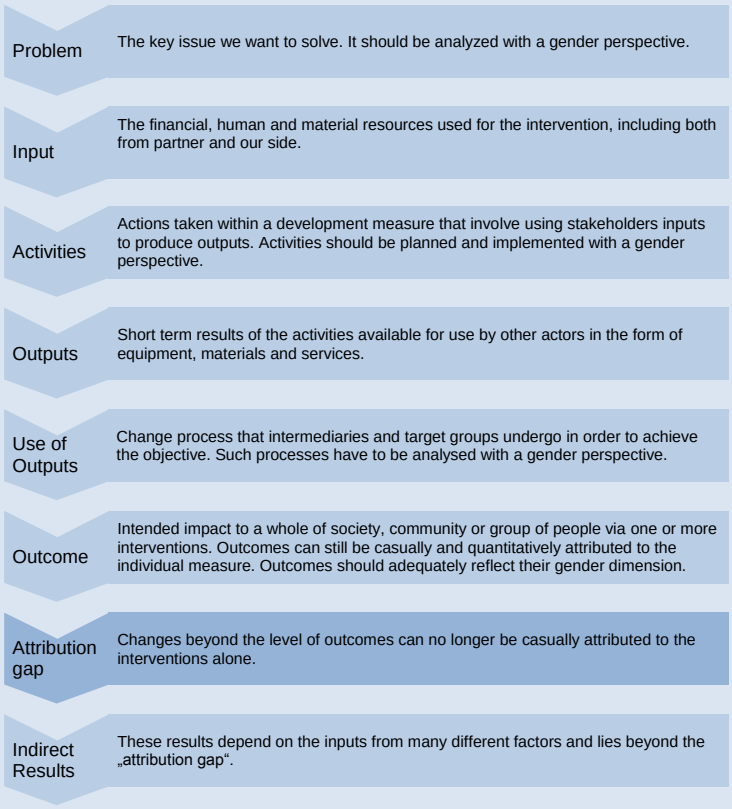
"It is said that if you do not know where you are going, any road will take you there. This lack of direction is what results-based management (RBM) is supposed to avoid. It is about choosing a direction and destination first, deciding on the route and intermediary stops required to get there, checking progress against a map and making course adjustments as required in order to realize the desired objectives." (UNESCO (2008): Results-Based Programming, Management and Monitoring (RBM) approach as applied at UNESCO. Paris.)

The way in which planning, monitoring and evaluation are undertaken in and for development interventions has considerably changed over the past decade. With a number of international developments, conferences and agreements – most notably the Paris Declaration (2005), the Accra Agenda for Action (AAA, 2008) and the Busan Gender Action Plan (2011) - the focus in international development cooperation has shifted towards improved effectiveness, ownership, accountability (e.g. of governments towards their citizens or of implementers towards their financers) and sustainability. Thus, strategic planning for interventions moved away from isolated activity planning (what are we going to do?) to a stronger focus on the overall results (what do we want to achieve?) as an integral part of a joint process with the counterparts in the partner country. The planning process should be based on the findings of the gender analysis, as described in the previous chapter. Gender-responsive results-based management focuses on performance and achievement of impacts (namely outputs, use of outputs, outcomes as well as indirect results) which consider and contribute to gender equality and avoid negative consequences for gender relations. These are commonly reflected in a results chain[5] (or a kind of result matrix). The intended outcomes usually define the project or programme objectives.

[5] For definitions of the different elements of the results chain, please refer to the glossary in the annex.

Elements of a gender-responsive results chain

Figure 4: Elements of a gender-responsive-results chain



Adapted and amended from: GIZ (2008): Results-based Monitoring. Guidelines for Technical Cooperation. Eschborn.

Gender-sensitive indicators

Furthermore, gender-responsive results-based management involves the formulation of indicators to measure success and performance. An indicator provides evidence that a certain condition exists or certain results have or have not been achieved. The formulation of gender-sensitive or –responsive indicators is therefore essential to ensure accountability towards the achievement of gender equality objectives[6].

[6] There are certain criteria indicators should fulfill. Two frameworks for such quality criteria are SMART (specific, measurable, achievable, relevant and time-bound) and SPICED (subjective, participatory, interpreted and communicable, cross-checked and compared, empowering and diverse and disaggregated).

Box 8: Gender-sensitive indicators

Different types of indicators can display our efforts concerning gender equality:

- *Sex-disaggregated indicator*: The value of the indicator is calculated separately for men and women and so allows comparisons to be made between the two groups; e.g. the ratio of voter turnout among men to that of voter turnout among women.
- Implicitly gendered indicators: In this case, the indicator makes no explicit reference to gender. However, if it is interpreted within a broader context, it is clear that the indicator is of particular relevance to women or men, e.g. the number and percentage of domestic violence prosecuted in courts
- Sex-specific indicators: Sex-specific indicators refer to a change in areas relevant to only one sex, e.g. violence against women or maternal mortality.
- Empowerment indicators: Indicator measuring how the living situation of women or men has changed due to our intervention. Empowerment indicators cover aspects such as mobility, decision making power, autonomy, ownership of household assets, freedom from domination, awareness, participation in public protests and political campaigns, contribution to family income, reproductive rights, exposure to information, and participation in development programmes.

Adapted and amended from: UNDP (2006): Measuring Democratic Governance: A Framework for Selecting Pro-Poor and Gender-Sensitive Indicators. New York.

Such indicators can reflect different levels of the results chain:

- *Input indicators*: They describe what goes into the programme, such as the number of hours and types of training, the amount of money spent or the quantity and quality of information materials. Such indicators are mostly directly related to the budget of a development measure.
- Process indicators: Such indicators serve as milestones for assessing project progress and the quality of the chosen processes. They indicate progress, success of further need for action. They are mostly applied at output and use of output level.
- Output indicators: Such indicators describe the programme or project activities, such as the number of women and men trained, the number of women and men policymaker at the briefing, and the types of benefits derived by women and men from the activities.
- Outcome indicators: They describe the actual changes in condition, such as changed attitudes as a result of the training and changed practices as a result of a programme activity. These indicators can exist at various levels: population, agency and program.

Means of verification

Once the indicators have been identified, it is necessary to identify the **sources of information or means of verification** (MoV) that will be used to verify the performance. Verification data should be timely, cost effective to collect, reliable and independent of biases. If the information is not readily available in a format suitable for monitoring and evaluation, specific arrangements for data collection should be included in the project activities. Wherever possible, existing sources and systems should be used instead of creating additional efforts and posing an additional burden on partners and stakeholders.

Gender policy markers in official development interventions

Box 9: Gender policy markers in official development interventions

Since 1997, OECD member states have been called on to use gender policy markers. These help member states to assess development interventions in terms of the contribution they make to realizing gender equality and strengthening the rights of women. There are three markers, which relate to the objectives system of projects: G-2, G-1 and G-0. In 2001, BMZ made it compulsory to categorize all projects and programmes of German development cooperation in line with these gender markers (or GG markers). There is a clear political directive to conduct gender analyses at the start of a development intervention on which the categorisation is based.[7]

GG-2: Gender equality is one of the main objectives of the development measure.

GG-1: The development intervention has positive impacts on gender equality that can be inferred from the concept. However, gender equality is not the main objective of the development intervention.

GG-0: The development intervention has no potential to measurably advance the cause of gender equality within the given framework of the development intervention.. Reasons for categorizing the intervention with this gender marker must be explained separately also based on an analysis.

Source: BMZ (2010): Gender Markers in Technical and Financial Cooperation. Unpublished.

Key elements to consider in a gender-responsive planning process

In summary, there are key elements, which should be considered in a gender-responsive planning process:

- Consider the international and national legal and institutional framework for gender equality in the corresponding field or sector.
- Use the stakeholder analysis developed during the analytical phase to identify actors on gender equality in the corresponding field or sector. If such an analysis was not gender-responsive, it should be undertaken again in order to be aware of gender compentent stakeholder and to avoid gender blindness.
- Consult different stakeholder (e.g. government institutions responsible for gender equality, gender focal points of envisaged partner institutions, women's organisations) and beneficiaries (representing different population groups according to factors such as gender, age, ethnicity, socio-economic status, religion) to create ownership and mutual accountability.
- Consider whether or not it is appropriate to have additional objectives relating to gender. If there are no concrete expected results defined related to gender, then gender tends to 'fade out'. Usually efforts tend to focus on the expected results as defined in planning documents. Sometimes there is a need to concretize existing indicators to make them more operational.
- Define gender-sensitive indicators to clarify objectives and facilitate monitoring. Check whether adequate means of verification are available.
- Explore promising and innovative strategies on how to enhance gender equality and women's empowerment. Consider the implications of possible solutions in

[7] See also GIZ (2011): Gender analyses. A manual for the gender-differentiated design of technical cooperation projects and programmes. Eschborn.

terms of likely impacts, opportunities that could be seized, and trade-offs between choosing one strategy over another.

- Identify obstacles that may hinder the participation of men and women from all sectors of society and of the negative impact the intervention might have on gender relations and define strategies to deal with these.
- Consider budgetary implications of the integration of gender and plan for allocation of resources for gender.
- Plan on the collection of quantitative and qualitative sex-disaggregated data in various aspects of the project or programme, especially and on the identified indicators.
- Define a steering structure that does provide the necessary expertise on gender and diversity.
- Spell out responsibilities and expectations concerning gender aspects.
- Determine activities to ensure attention to gender issues and ensure that the activities are gender-sensitive. Reflect on different gender needs in the planning of events (time and participation).
- Promote the institutional anchoring of the gender approach in collaborating organisations.
- Reflect gender relevant topics in the project (HR, working environment).
- During the planning process, staff members should assume the role of lobbyists for disadvantaged groups by ensuring that the latter have the opportunity to influence the design of the intervention and that their interests are taken into account.

Gender-responsive budgeting

Box 10: Gender-responsive budgeting

Gender-responsive budgeting is an application of gender mainstreaming in the budgetary process, which is also part of the planning process. It means a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality.

Gender budgeting is about bridging two sets of knowledge that have usually been kept separate: knowledge of gender inequality and knowledge of public finance and public sector programmes. However, elements of gender-responsive budgeting can also be applied to specific sectors and interventions. Analyzing the gender implications of how the project or programme budget is spend with a gender perspective can provide interesting insights how gender-sensitive our interventions really are.

4. Gender-sensitive implementation – Putting intentions into action

If the gender perspective has been incorporated during the analytical and planning phase, the basis for mainstreaming gender throughout the implementation of a development intervention is already created. However, during implementation, the participation of women and men and their respective access to decision-making and benefits should not be taken for granted, but conscious efforts have to be undertaken to ensure their equal chance for participation. Corresponding strategies have to be developed. It is essential to ensure that development interventions keep a conscious eye on the impact they have on gender relations.

Stages of gender integration strategies

Continuum

Box 11: Stages of gender integration strategies

There are different stages of gender integration strategies. They rank from those that exploit gender inequalities to those that accommodate gender differences, and those that actually transform gender relations. Not all interventions seek to transform gender relations, although, from a gender perspective, that would be the preferred outcome. Some interventions may actually **exploit gender inequalities**, e.g. in the pursuit of reproductive health and demographic goals. The situation of women may worsen, for example, when the use of male opinion leaders or aggressive imagery in marketing slogans aimed at men reinforces male dominance of decision-making authority and resources. Still other interventions **accommodate gender differences**. Such interventions make it easier for women to fulfil the duties ascribed to them by their gender roles, without attempting to reduce gender inequality. Interventions that seek to **transform gender relations** may take more time to bring about results, but such changes are more likely to bring long-term and sustainable benefits to women and families. Programmes and policies may transform gender relations through:

- Encouraging critical awareness of gender roles and norms.
- Promoting the position of women relative to men.
- Challenging the imbalance of power, distribution of resources, and allocation of duties between women and men.
- Addressing the unequal power relationships between women.

Adapted and amended from: IGWG/WHO (2005): So What Report. A Look at Whether Integrating a Gender Focus Into Programmes Makes a Difference to Outcomes. Geneva.

Gender negative: The impact of gender relations on development and of development on gender relations is negated. Corresponding approaches reinforce gender-discrimination and can have disempowering effects, especially for women. This is an unacceptable stage for any programme; however, it is the starting point on a continuum and therefore needs to be cited as a reference.

Gender blind: There is a lack of recognition that gender is an essential determinant of life choices. There is no recognition that development can have different effects on women and on men. Such an approach can also reinforce gender-discrimination.

Gender aware: There is recognition of gender inequity and differences between women and men in terms of access to and control over resources, including opportunities for development and that women and men have different perspectives and interests. However, this awareness is not necessarily translated into practice.

Gender sensitive: There is recognition of underlying and hidden causes of inequalities between women and men. Differences are felt as undesirable and unjustifiable and there is an understanding of problems resulting from inequity and discrimination. Gender relations are considered throughout the intervention.

Gender responsive: There is recognition of underlying and hidden causes of inequalities between women and men. At this stage development interventions systematically incorporate or address gender concerns and issues.

Gender transformative: The transformation of unequal gender relations is perceived as central to positive development outcomes. The aim is to enhance opportunities for both men and women.

The different stages underline that it is important to recognise the existing level of awareness for a development intervention. Importantly, different stages might apply for strategic orientation on paper and the practically applied approach or existing level of awareness of the stakeholders involved. Within the continuum however the objective is to increase awareness **on what gender equality really is about** –especially in

countries where gender is ill-perceived as a women centred approach- so that gender negative or gender blind approaches can be transformed into gender responsive and gender transformative ones.[8]

Awareness raising and sensitization

Increased awareness of government counterparts, project / programme management and beneficiaries on gender differences and their practical implications can significantly improve development interventions. Hence, sensitization and awareness-raising on the relevance of adapting a gender approach is important. The aim is the recognition that life experiences, expectations and needs of women and men are different – and often women are disadvantaged compared to men. However, interests and needs of women and men are subject to change. Gender awareness in development refers to the perception and realization of ways in which women and men participate in the development process, how they are affected by it and how they benefit from it.

In some countries unfortunately gender equality is perceived as a "western, euro-centric" approach that is being imposed and does not "fit" into the culture. Many times, however, gender equality is being ill-perceived as a solely feminist approach that is to empower women at all costs while ignoring existing power relations, social patterns, traditions and practices. A gender approach recognises the different needs of men and women, existing patterns and causes of their level of participation and representation and seeks to work towards gender equality, minimizing existing inequalities while seeking benefits for both men and women in the process.

A misapprehended gender approach often follows a narrow understanding of the complexity of gender relations or is a result of the following misunderstandings.

Some clarifications on the implementation of a gender approach

Box 12: Some clarifications on the implementation of a gender approach

Women's participation is not equal to gender: To 'include' women in an intervention is not enough to claim that an intervention is gender aware. A women-only intervention is gender blind if it keeps women in traditional areas and does not offer scope for change towards gender equality. An intervention targeted at both women and men is also gender-blind if it does not offer equal opportunities to women and men to participate and benefit according to their needs. A men-only activity (e.g. educating men on family planning) is gender-aware if it aims to change gender relations between women and men. Of course, strategies promoting equal numbers of women and men, including quotas, can really boost women's participation. However, quotas are often interpreted as a maximum and efforts are not made to reach a real gender balance. To be effective, these strategies need to be supported with capacity building and empowerment measures.

Women's organisations are not the only partners: Women's organisations,

[8] Please note that the different stages cannot be equalized with the OECD/DAC and BMZ GG-markers.

governmental institutions or civil society, are key partners for gender. But they are not the only partners. They are not necessarily gender competent, they may lack the capacity, or the will, to work with men and they may resist addressing strategic gender needs which are too politically or culturally challenging. Alliances must be created broadly across sectors and interests to generate new synergies and bring new competences to the gender debates.

Women are not the only actors: So far, women have been the main actors working on gender (as trainers, activists, planners etc.). This area of work represents a real opportunity for women to develop as professionals. However, working only with professional women can marginalize gender as a «women's issue». It is essential to develop men's skills too in this area to gender balance working teams and to bring men's point of view into the gender debates.

Adapted from: SDC (2003): Gender in Programmes/Projects. Zurich.

Several strategies can be applied for awareness-raising and sensitization, which form part of the capacity development approach chosen within the intervention. Project staff and implementing organisations need to be trained on how to address gender differences in the implementation of projects and programmes. Emerging consensus is that efforts to increase gender awareness must take the local culture into account. Regional and even country-specific strategies must therefore be developed for gender sensitization, awareness-raising and training.

Gender trainings

Box 13: Gender trainings

Gender trainings aim at developing awareness and capacities on gender issues, to bring about individual or organisational change for gender equality and to reduce the gender-bias, which informs the actions of individuals and institutions. Within GIZ, a manual has been designed in 2007, which can be used to plan and implement trainings (see GIZ (2007): Manual for the Design, Implementation and Evaluation of Trainings, Workshops and Sensitization on Gender. Eschborn). Gender trainings commonly involve:

- Raising participants' awareness of the different and unequal roles and responsibilities of women and men in any particular context;
- Looking at ways development interventions affect, and are affected by differences and inequalities between women and men;
- Equipping participants with relevant knowledge and skills to understand gender differences and inequalities in the context of their work and to plan and implement policies and interventions to promote gender equality.

The message should be that gender cannot simply be added to existing development practices as an additional component. Gender awareness is not an isolated issue; it is a perspective, a set of insights and a mindset, which informs and shapes our understanding of society and people. Gender awareness means looking with open eyes, in a way, which is constantly open to question our assumptions.

However, raising awareness and increasing gender capacities goes well beyond training. Sometimes there is a need for awareness raising or social marketing campaigns, institutional gender strategies and policies and the establishment of gender focal persons. Gender capacities have to be built at the different levels (individual, organisational, system) and for the different elements described in the section on organisational analysis. Data collection and processing through a gender

analysis, knowledge management and sharing of promising experiences regarding gender equality also contribute to the capacity building of development actors and their partner institutions.

Learning and innovation

The abovementioned illustrates that learning and innovation is crucial in all stages of the project cycle. Organisations have to become learning organisations in order to be effective and adaptable to change and learning from their own mistakes and successes, as well as those lessons learned by others.

Monitoring and evaluation provide sound opportunities for learning if recommendations, lessons learned and promising practices are documented and disseminated. Hence, findings of evaluations should be documented and disseminated widely among the stakeholders involved for future reference. In addition, experiences and lessons learned need to be widely discussed and disseminated within the organisation in order to fuel learning and innovation.

In addition, capacity development in the field of gender mainstreaming and gender equality in the corresponding sector should also be part of development interventions. Such capacity development measures can range from individual gender coaching to organised gender trainings to organisational development measures, such as the development of institutional gender policies.

Key questions to ensure a gender perspective in learning and innovation

Box 14: Key questions to ensure a gender perspective in learning and innovation

There are key questions to be asked to ensure that gender is part of the institutional learning:

- Do we support knowledge management on gender equality in our interventions and our as well as our partner institutions?
- Do we keep track on changes relevant to gender equality, e.g. new legislation, government policies, commitments on gender equality or lessons learned from others?
- Do we use updated information on gender issues in our sector and the interdependencies with other cross-cutting issues such as human rights, poverty reduction or conflict sensitivity?
- Do we cooperate with other donors to generate data on gender?
- Do progress reports take gender equality into account – either throughout the report or in special sections?
- Do we support capacity development among our partner institutions and other relevant stakeholder on gender equality?
- Do we contribute to or enforce gender mainstreaming in the work of our partners?

Steps for mainstreaming gender into five success factors for sustainable development

There are various steps to be taken to integrate a gender approach in the implementation phase. Many of them are also reflected in the framework for an organisational gender analysis previously described. The steps are subsequently organised according to the five success factors defined in the GIZ management model for sustainable development, Capacity WORKS.

Strategy:

- **Political will:** Gender mainstreaming is a leadership responsibility. The project or programme leadership should lead by example, put gender on the agenda, promoting gender mainstreaming and gender equality through results.
- **Gender focal points as change agents:** Gender mainstreaming responsibilities of all project management staff should be documented. However, inclusion or appointment of a gender adviser or gender focal point can be crucial for ensuring gender-sensitivity during project implementation. Their tasks should be defined with the project or programme manager and all team members briefed on their role and tasks (as usually it means working across the whole programme). Relevant competencies and an adequate (time) budget need to be ensured.
- **Gender staffing:** Mixed staff is fundamental especially in countries where social and cultural norms limit extra-familial contact between men and women. However, these countries are also the most difficult environments for recruiting women. Challenges include restrictions on overnight stays and difficulties in communicating with male colleagues, hence, efforts are needed to tackle these difficulties.
- **Dialogue with men and women of the target groups:** A constant dialogue is needed to allow women and men to reflect on their respective priorities for change (self-awareness/consciousness-raising process). This should be a transparent process and can be done through public meetings, separate focus group discussions, interviews and other participatory methods.
- **Inclusion in annual planning:** Annual planning requires a quick review of the main socio-economic, political and environmental changes as well as policies and strategies and their immediate effects on women and men in the corresponding area of work. Annual planning must take stock of new gender related issues and demands that may have emerged. Monitoring and budget reviews should include a gender lens. During the planning process, staff members should assume the role of lobbyists for disadvantaged groups by ensuring that the latter have the opportunity to influence the design of the intervention and that their interests are taken into account.
- **Non-sexist language and images:** The language also reflects how we approach gender equality. Hence, gender-neutral language should be used (e.g. the use of he / she) and illustrations have to be checked so they do not stereotype gender relations.

Cooperation:

- **Gender sensitive partners:** Partners should either be aware of gender issues or willing to learn and contribute to gender equality. Awareness raising or capacity building measures might be necessary to integrate a gender approach during implementation.
- **Strategic alliances:** Strategic alliances should be entered into with protagonists from the team and with other players, if possibly even change agents, in the country.
- **Synergies and networking:** Network and collaborate with gender competent actors, such as academics, women's organisations or gender state authorities. In

order to foster synergies and enhance quality, gender quality circles or gender working groups can be established. Such working groups can take different forms. Some groups are composed by different development actors to foster exchange and cooperation among the different actors. Other groups are set up by staff of one organisation to foster exchange across different sectors. Another option is the setup of sectoral gender working groups comprised of donors and local organisations working in the corresponding sector.

Steering:

Steering

- **Plan of Operations:** The plan of operations should reflect gender and it has to be ensured that all activities are gender-sensitive. The different gender needs should also be reflected when planning for events (time and participation).
- **Resources:** Adequate resources in terms of funds and personnel have to be allocated to gender mainstreaming (gender budgeting).
- **Composition and terms of reference of missions:** To improve gender mainstreaming in missions, the inclusion of a gender specialist may not be sufficient. The team leader and all team members of the mission need to have a mandate – reflected in their terms of reference – to mainstream gender concerns within their tasks. There are indications that having both male and female consultants increases the likelihood that women and men will be consulted and that the priorities and constraints of both women and men will be reflected.

Processes:

Processes

- **Internal management:** Internally, the programme or project should also reflect gender relevant topics such as working hours, human resource development or the working environment.
- **Gender-sensitive monitoring:** Ensure participatory monitoring and evaluation processes by using appropriate gender-differentiated methods and collecting sex-disaggregated data. If feasible, define additional (internal) indicators for gender equality.

Learning and innovation:

Learning and innovation

- **Gender capacities:** Activities can be planned to build the capacity of internal and partners' staff on gender, to integrate it as a transversal theme in procedures (training modules, tools, indicators) and to promote equal opportunities. Gender workshops offer the opportunity to raise awareness and enhance methodological and analytical capacities to systematically integrate a gender perspective into the implementation process. However, a workshop should not be an isolated event, but one component within a systematic process. Experience shows that the output of such a workshop should always be relevant for the practical work, say in the form of an agreement on concrete activities within the scope of the project or programme.
- **Institutional anchoring:** Even though it is reasonable to conduct promising and innovative measures, exemplary measures alone are often not sustainable. In addition, institutional anchoring should be fostered in collaborating organisations.

We were gender blind during analysis and planning, what do we do now?

Box 15: We were gender blind during analysis and planning, what do we do now?

- If possible, try to collect the relevant data (e.g. through international organisations, other donors, counterparts, women's organisations) for the point in time, when the intervention started. If this is not feasible, conduct a gender analysis as a baseline for the future impact you might have on gender equality.
- For objectives and indicators that are not specifically engendered, ask yourself key questions on the possible positive and negative disaggregated impact. If feasible, develop additional (internal) indicators.
- Name a gender focal person within your staff and define the role and responsibilities and ensure gender capacities among all staff members.
- Discuss with counterparts how a gender perspective can be better incorporated.
- Participate in existing gender working groups or start new ones.
- Analyse your co-operations, if necessary, start new co-operations to incorporate gender-competent actors.
- Analyse your activities and ensure their gender sensitivity.
- Integrate a gender perspective in the terms of reference for future missions and tasks.
- Integrate gender in reporting and the development of lessons learned and success stories.

Key questions for the integration of a gender perspective during implementation

Box 16: Key questions for the integration of a gender perspective during implementation

- Does the staff have enough gender expertise to integrate a gender approach? Are additional resources (capacity building, external know-how) needed?
- Are funds being made available for gender mainstreaming activities?
- Which (governmental) institutions are responsible for gender equity and equality and are they (re-)presented during / involved in the implementation accordingly to the project / programme design?
- Are civil society organisations working on gender consulted during / involved in the implementation?
- How do women and men participate in the development intervention?
- Are there any factors that may prevent women or men from fully participating and benefiting from the intervention? How can these factors be addressed?

5. Monitoring and evaluation – Checking the achievements

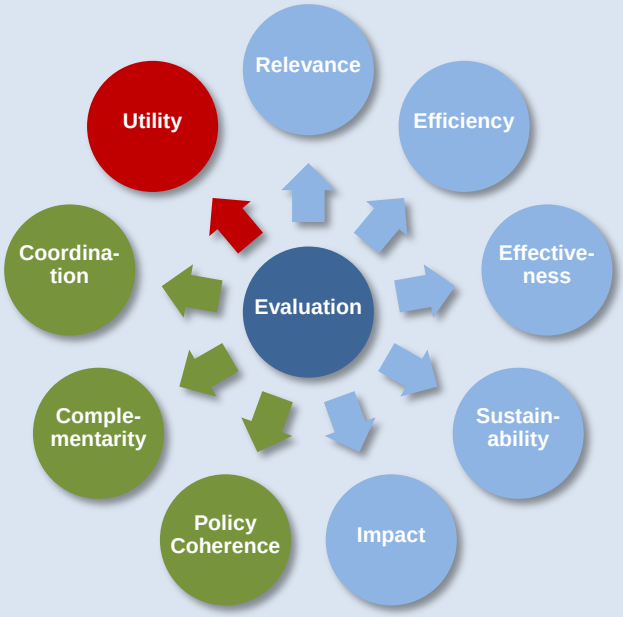
Monitoring and evaluation are essential when it comes to measuring progress towards objectives and effectiveness of development projects and programmes. As illustrated in the project cycle previously described, monitoring is the continuous assessment of results chains during implementation, whereas evaluation is a periodic, comprehensive and systematic review of a development intervention, its design, implementation and results.

Distinction monitoring and evaluation

The performance of a development intervention is rated by the outcome (direct results) achieved and by the indirect development results. There are several criteria defined through OECD/DAC (see blue circles below), the European Union and the BMZ (see green circles below) as well as the Deutsche Gesellschaft für Evaluierung (DeGEval) (see red circle below), which should be assessed during monitoring and evaluation.

Evaluation criteria for development interventions

Figure 5: Evaluation criteria for development interventions



Key questions for the evaluation criteria

Box 17: Key questions for the evaluation criteria

1. Relevance: Does the project or programme relate in a meaningful way to potentially transforming gender relations? Are the objectives are consistent with the target group's priorities and the recipient and donors' policies?
2. Efficiency: How were resources converted into results? Were the activities cost-effective? Did the different activities for women and men increase equality or hinder its achievements have similar or diverging effects? This generally requires comparing alternative approaches to achieving the same outputs, to see whether the most efficient process has been adopted.
3. Effectiveness: To what extent are the objectives of women and men achieved? What factors contributed to success? What hindered the success?
4. Sustainability: Will the benefits be maintained after the project or programme has ended? Do women and men in partner countries have ownership of the activities and programmes?
5. Impact: What happened to women and men as a result of the project's or programme's activities? What are the positive and negative changes?
6. Policy Coherence: How does the development intervention relate to other policies? Are different efforts undermining or supporting each other when it comes to achieving gender equality?
7. Complementarity: Is the development intervention complementary to the policies and interventions of the partners and other donors?
8. Coordination: Is the development intervention undertaken in coordination with other donors to maximise the development effectiveness?
9. Utility: What is the value of the intervention for the beneficiaries and partner institutions? Applied to evaluations: To which extent are evaluations guided by the information needs of their users?

Adapted and amended from: GIZ (2010): Steps for Action to Promote Gender Equality. Eschborn.

Managing for development results

Monitoring and evaluation are vital activities in successful project and programme implementation as they can help to adjust the strategy to reach set goals and are crucial for organisational learning. They are becoming even more important considering the changing international development agenda "Managing for Development Results" focusing more on the actual impact of development measures. In addition, they also allow greater transparency and accountability for beneficiaries and stakeholders. If a participatory and gender-responsive approach is adapted from the beginning to the end of an intervention, this can ensure that women and men actively participate in and benefit from the development intervention. They can contribute to decisions about what should be measured and what indicators should be used, as well as participate in the monitoring and evaluation process themselves.

Establishing a monitoring system

The monitoring system – meaning the clarification of what should be monitored, by whom, how and when – ideally is set up during the planning phase of the project cycle or at the latest in the beginning of implementation. A solid gender-analysis, which should be implemented as part of analysis, strategy development and planning, can consequently serve as a baseline for subsequent monitoring and evaluation. If such an analysis was not undertaken, it is essential to implement such an analysis at a later stage and make necessary adjustments. To reveal whether a programme addresses the different priorities and needs of women and men and to determine if it has an impact on gender relations, gender aspects must also be integrated into monitoring and evaluation processes. The inclusion of explicit gender equality objectives and

indicators at the planning stage also strengthens accountability on the progress made on gender equality issues.

A monitoring system is a way of steering the project/programme and organizing the monitoring work and so that it is less time consuming and easy to implement. Monitoring systems vary in sophistication from a piece of paper and some note books or files, to electronic filing systems and databases. The most important thing is not how sophisticated the system is but whether the information needed for gender-responsive decision-making is collected, reviewed systematically and used for necessary adaptations. But progress measures are not just activities to be done once a month (e.g. monitoring) or once a year or at the end of a project (e.g. evaluation). Rather gender-responsive monitoring and evaluation is *a frame of mind, or a way of thinking*.

Need for sex-disaggregated data

Effective gender-responsive monitoring and evaluation needs to be informed by qualitative and quantitative data concerning the impact we have on gender relations. Without sufficient data a meaningful analysis of what has been achieved in terms of gender equality is very difficult. This also implies that all data should be collected, presented and analysed in a sex-disaggregated manner. However, information on the impact and social processes of development measures on gender, where evidence can be shown through sex-disaggregated information (e.g. who uses a newly introduced service, when and how), is often lacking. If partner organisations do not have sex-disaggregated data that can be used, an institutionalisation of the collection of sex-disaggregated data should be supported in order to ensure sustainability. While often some quantitative information is provided (e.g. financial or physical progress), qualitative information (e.g. the impact on women's incomes, increase in women's control over assets) is often not available and needs to be generated, analysed and incorporated in subsequent planning and implementation. This way the information can also serve as a means of verification for the set indicators.

Box 18: Issues relevant to monitoring and evaluation

Issues relevant to monitoring and evaluation

There are several issues that should be considered **for monitoring and evaluation** of development interventions:

- Conduct a baseline gender analysis based on existing data, or support the collection of sex-disaggregated data, if necessary, collect relevant data. Select qualitative and quantitative data collection methods, which are appropriate for collecting gender disaggregated information, choose participatory methods, where possible.
- Set gender-responsive goals and develop gender-sensitive indicators, ensuring a balance between qualitative and quantitative information. Sex-disaggregate other indicators, if possible.
- Consult different stakeholders, both women and men.
- Take not only intended impacts into consideration, but also unintended impacts that might even have negative outcomes on gender equality.
- Adjust activities of the programme in case of negative outcomes or impacts.
- Support capacity building of partner institutions, e.g. to determine appropriate research questions to investigate potential, to identify and collect sex-disaggregated information using a range of different methods, and to develop

gender-sensitive indicators, and to analyse the data collected in a systematic way.

- Identify and disseminate “lessons learned” and “promising practices” related to working with a gender perspective so these can be transmitted throughout the organisation and to other organisations.

Other issues should be applied for **gender-responsive monitoring:**

- Keep track on changes relevant to gender equality, e.g. new legislation, government policies or commitments on gender equality or new women's networks or organisations or changed profile/capacity of existing organisations as well as changes in economic and social conditions or trends that affect priorities, resources, and needs in your sector.

At last, some issues should be applied for a **gender-responsive evaluation:**

- Set up an evaluation team with thorough gender-expertise and include gender aspects in terms of reference (ToRs) while preparing the evaluation. Ownership and local capacity development can be enhanced through the inclusion of local experts.
- Ensure that all data collected is disaggregated by sex and other relevant social factors, such as ethnicity or socio-economic status.
- Seek the input of both women and men during evaluations and analyse differences and similarities.
- Review the draft evaluation report to ensure that gender-related omissions and successes in the project/programme are reflected.
- Wherever possible, the manner in which gender-related information is presented in reports should be consistent, in order to be able to make comparisons across time and projects. Evaluators (internal or external) need previous evaluations in order to use them as a reference.

Annexes

1 Recommended readings

- BMZ: Genderaktionsplan. Bonn, 2009.
- BMZ: Gleichberechtigung. Schlüssel zur Umsetzung der Millenniumserklärung der Vereinten
- Nationen, Bonn, 2007.
- BMZ: Konzept für die Förderung der gleichberechtigten Beteiligung von Frauen und Männern am Entwicklungsprozess. Gleichberechtigungskonzept. 2. überarbeitete Fassung. Bonn, 2001.
- BRIDGE (2007): Gender and Indicators. Overview Report. Brighton.
- DFID (2008): The Gender Manual A Practical Guide. London
- European Comission (2011): Toolkit on mainstreaming gender equality in EC development cooperation. (http://ec.europa.eu/europeaid/sp/gender-toolkit/index.htm). Brussels.
- GIZ (2012): Gender Strategy. Gender pays off!. Eschborn.
- GIZ (2011): Gender analyses. A manual for the gender-differentiated design of technical cooperation projects and programmes. Eschborn.
- GIZ (2010): Steps for Action to Promote Gender Equality. Eschborn.
- GIZ (2010): Gender Starter-Kit. Eschborn.
- GIZ (2010): Guidelines. Gender in Reporting. Eschborn.
- GIZ (2010): Capacity WORKS und die entwicklungspolitischen Schlüsselthemen. Eschborn.
- GIZ (2008): Results-based Monitoring. Guidelines for Technical Cooperation. Eschborn.
- GIZ (2007): Manual for the Design, Implementation and Evaluation of Trainings, Workshops and Sensitization on Gender. Eschborn.
- GIZ (2006): Wirkungen auf die Gleichstellung der Geschlechter in Vorhaben der EZ. G-Kennungen in TZ und FZ. Anwendungsbeispiele und Standards. Eschborn, 2006.
- GIZ (2006): Manual for Training on Gender Responsive Budgeting. Eschborn.
- NORAD (2006): Lessons from Evaluations of Women and Gender Equality in Development Cooperation. Oslo.
- OECD/DAC GENDERNET (2004): Effective Strategies for Promoting Gender Equality. Paris.
- OECD/DAC (2002): Glossary of Key Terms in Evaluation and Results Based Management. Paris.
- SDC (2003): Gender in Practice: A Tool-Kit for SDC and its Partners. (http://www.deza.admin.ch/en/Home/Themes/Gender/General_and_thematic_tools/Gender_Tool_Kit). Zurich.
- UNDP (2000): Gender Mainstreaming Learning and Information Packs. New York.

2 Glossary of key terms

Activity

Actions taken or work performed through which inputs, such as funds, technical assistance and other types of resources are mobilized to produce specific outputs (OECD/DAC (2002): Glossary of Key Terms in Evaluation and Results Based Management. Paris.)

Attribution

Attribution is the ascription of a causal link between observed (or expected to be observed) changes and a specific intervention.

Development project

Development projects represent the commitment of human and physical resources to produce specific outputs in a given time and budget framework. They vary in scale, purpose and duration. They may be initiated within a certain community, requiring modest inputs and producing tangible outputs within a relatively short timeframe. At the other extreme, projects may require substantial financial resources and only generate benefits in the long term. Development projects may stand-alone or be integrated into a programme, with several projects contributing to one overall goal.

Development programme

A development programme is a time bound intervention involving multiple activities that may cut across sectors, themes and/or geographic areas contributing to one overall goal.

Development intervention

An instrument for partner (donor and non-donor) support aimed to promote development. Once referring to a development intervention, both development projects and programmes are incorporated.

Empowerment

Empowerment describes both the process and the outcome of people - women and men - taking control over their lives: setting their own agendas, gaining skills (or having their own skills and knowledge recognized), increasing self-confidence, solving problems, and developing self reliance. Empowerment implies an expansion of the ability to make strategic life choices in a context where this ability was previously denied.

Evaluation

Evaluation is the systematic collection and analysis of data in order to assess the relevance, effectiveness and impact of activities in light of the objectives of a

development intervention. It involves assessing the strengths and weaknesses of a development intervention, strategies and/or policies to improve their effectiveness. It involves giving feedback about the progress to donors, implementers and beneficiaries of the project. Evaluations are generally done either during the span of a programme (mid-term evaluation) to measure and allow for mid-stream programme adjustments or upon completion of programmes (ex-post evaluation). (Source: ICMPD (2010): Monitoring and Evaluation Handbook for National Action Plans against Trafficking in Human Beings. Vienna.)

Gender and sex

The term gender refers to the male and female roles shaped by a society, learned individually and re-negotiated by each generation. Male and female roles are determined primarily by the social, cultural and economic organisation of a society, and by the prevailing religious, moral and legal perceptions. Female and male roles and the scope of actions performed by men and women are not static, but are subject to constant change. They can vary enormously from one society to another, and even within one society there can be significant differences depending on social class, family status, and ethnic or religious background. These roles are not neutral, but are characterized by different possibilities for making choices, as well as different rights and decision-making powers, which predominantly disadvantage women. In contrast to societally-shaped roles, or gender, biological sex is determined at birth and can only be changed in the long run.

Gender analysis

A gender analysis examines the pattern and norms of what women and men, girls and boys do and experience in relation to the issues being examined and addressed. Where patterns of gender difference and inequality are revealed in sex disaggregated data, gender analysis examines why the disparities are there, whether they are a matter for concern, and how they are and might be addressed.

Gender equity

Gender equity refers to the equal treatment of women and men in terms of rights, benefits, obligations and opportunities. To ensure fairness, measures must often be available to compensate for historical and social disadvantages that prevent men and women from otherwise operating on a level playing field. Equity leads to equality. (Sources: adapted from GIZ/GAD 2007: Training Resource Book Gender and Decentralisation, Phnom Penh and UNDP 2007: Gender Mainstreaming in Practice. New York). The European Commission has quoted Gender equity as a condition in which women and men participate as equals and have equal access to socio-economic resources (1998). Consequently, the Gender Equity Index (GDI, Social Watch) measures existing inequities of men and women in the area of economic activity, education and empowerment.

Gender equality

Gender equality refers to the equal rights, responsibilities and opportunities of women and men and girls and boys. Equality does not mean that women and men will become the same but that women's and men's rights, responsibilities and opportunities will not depend on whether they are born male or female. Gender equality implies that the interests, needs and priorities of both women and men are taken into consideration, recognizing the diversity of different groups of women and men. Gender equality is not a 'women's issue' but should concern and fully engage men as well as women. Equality between women and men is seen both as a human rights issue and as a precondition for, and indicator of, sustainable people-centred development. (Source: UNDP (no date): Gender Mainstreaming Learning and Information Packs. New York.)

Gender competence

Gender competence includes several different aspects like identifying and addressing gender concerns and the capability to analyse practical and strategic gender needs on an individual and societal level. Since sustainable development cannot be achieved without gender equality, gender competence is also a key qualification for development cooperation.

Gender mainstreaming

Gender mainstreaming is widely understood as a strategy for institutionalizing and integrating gender concerns into the mainstream. That means to explicitly integrate the objective of gender equality **in any planned action, including legislation, policies and programmes, in all areas and at all levels,** rather than being handled in isolation. Hence, **making women's as well as men's concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and social spheres so that women and men benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality.**

Gender perspective

A gender perspective is a theoretical and methodological approach that permits us to recognize and analyse the identities, viewpoints, and relations, especially between women and women, women and men, and men and men.

Impact

Positive and negative, primary and secondary long-term effects produced by a development intervention, directly or indirectly, intended or unintended. (OECD/DAC (2002): Glossary of Key Terms in Evaluation and Results Based Management. Paris.)

Indicator

Quantitative or qualitative factor or variable that provides a simple and reliable means to measure achievement, to reflect the changes connected to an intervention, or to help assess the performance of a development actor. An indicator is a statistical measurement that shows the change in a particular context over a given time of period (e.g.: adult literacy rates in a country increased from 56 per cent in 1975 to 84 per cent 2010). It differs from statistics because an indicator compares to a baseline or norm rather than merely presenting facts.

Inputs

The financial, human and material resources used for the development intervention.

Means of verification

Means of verification are sources of qualitative or quantitative information which can measure whether the indicators and results have been achieved.

Monitoring

Monitoring is the continuous, regular, systematic and purposeful observation, gathering of information, and recording of activities, projects, programmes, strategies and/or policies. To monitor is to check on how planned activities are progressing, to identify operational difficulties and to recommend actions. Monitoring is aimed at improving the efficiency and effectiveness of an initiative and at ensuring that activities are transformed into results/outputs. It involves making progress transparent by giving feedback to donors, implementers and beneficiaries of the project. Monitoring is always undertaken during the implementation of activities, projects, programmes, strategies and/or policies. (Source: ICMPD (2010): Monitoring and Evaluation Handbook for National Action Plans against Trafficking in Human Beings. Vienna.)

Outcome

Outcomes are the likely or achieved short-term and medium-term effects of an intervention's outputs that can still be causally and quantitatively attributed to the project. This is usually the formulated objective of a development intervention.

Output

Outputs are the short-term results of the activities, available for use by other actors in form of equipment, materials and services.

Practical gender needs

Practical needs are related to the concrete living conditions of women and men and their present workloads and refer to the immediate needs, like, need for clean water supply, credit schemes or fuel for cooking. These are usually addressed through

short-term development interventions. They are in themselves unlikely to challenge the underlying reasons for unequal aspects of gender relations.

Project management

Despite the difference in scale and nature of projects, there are aspects of sound project management that are universal. Project management entails the planning, execution, monitoring and evaluation as well as closing of a project or programme.

Result

Results are changes resulting from an intervention. They may be intended or unintended, expected or unexpected, positive or negative. In our projects and programmes, we aim for positive development policy results. They are part of a results chain (activities, outputs, use of outputs, outcome (direct results) and indirect results) that is influenced by the project/programme measures. (GIZ (2011): O+R. Eschborn.)

Results-based management

Results-Based Management (RBM) is a management strategy focusing on performance and achievement of outputs, outcomes, and impacts. RBM identifies strategic elements, such as results, outcomes, impact and outputs and their causal relationship, following a number of assumptions and risks identified. It involves the formulation of relevant indicators to measure success and performance. RBM, as a strategic approach, importantly affects reporting and decision making. (Source: ICMPD (2010): Monitoring and Evaluation Handbook for National Action Plans against Trafficking in Human Beings. Vienna.)

Strategic gender interests

Strategic interests aim to reduce existing disparities and to enhance gender equality. These may include equal access to decision making power, land ownership, shared responsibility with men for child rearing or the abolition of violence and control over women.

Use of output

The use of output is the change process that intermediaries and target groups undergo in order to achieve the objective.

Tools 0: Gender in general project management

Tool 0.1.: Checklist for the incorporation of gender at my workplace

Area	Guiding Questions
Work Field	▪ What are my specific thematic areas of work? ▪ Which concrete tasks do I have? ▪ What are the gender dimensions of these themes and tasks?
Objectives	▪ What are the objectives of my work? ▪ How is gender reflected or integrated in these objectives? ▪ Could I formulate additional gender objectives?
Measures	▪ Do I need additional data to incorporate gender into my work? ▪ How can I incorporate gender into annual planning, monitoring and reporting in my area of work? ▪ Could I foster exchange on gender mainstreaming in my work field and/or team?
Framework	▪ What is the institutional framework for gender equality? ▪ If feasible, can I integrate gender into my management objectives? ▪ Which institutional obstacles hinder the integration of a gender approach?

Tool 0.2.: Overview of gender-oriented project planning (GOPP)

The following table provides an overview of the elements of planning outlining what specifically is necessary for a gender-oriented project planning.

	Element	Content
Analysis	Situational analysis	Situational analysis for the development intervention. ♀♂: Include either a specific gender analysis or mainstream gender within the analysis of the initial situation.
	Target group analysis	Analysis of the target group of the intervention. ♀♂: Ensure a gender differentiated analysis of the target group and its description.
	Framework	Analysis of the political, socio-economic and institutional framework of the intervention. ♀♂: Include a gender perspective in the analysis of the political, socio-economic and institutional framework or conduct a specific framework analysis for gender if necessary.
Planning	Objectives	Formulation and of the objectives of the intervention. ♀♂: Identify gender related objectives or gender aspects relevant for the objectives.
	Indicators	Formulation of indicators for the intervention and specify means of verification. ♀♂: Ensure a gender sensitive formulation of indicators and/or formulate specific indicators for gender equality objectives.
	Steering	Defining the steering structure of the intervention. ♀♂: Ensure the inclusion of either gender competent staff from the partner institutions or include additional institutions from the gender machineries in the partner country in the steering.

	Entry points	Identification and description of possible entry points and strategies for the intervention. ♀♂: Identify and describe possible entry points and strategies for the achievement of gender related objectives or gender aspects in the objectives.
	Intervention	Brief description of the intervention and topic. ♀♂: Include and reflect relevant gender issues for the intervention and topic.
Implementation	Instruments and methods	Definition of instruments and methods. ♀♂: Include instruments and methods which can be used to foster gender equality and to reach the gender related objectives of the gender aspects in the objectives.
	Prerequisites and support	Definition of need for support (e.g. external know-how and for which area). ♀♂: Define need for support and suitable partners with (external) adequate gender know-how (including for which area/aspect specifically).
Evalua-tion	Evaluation	Analyse intended and unintended results of the intervention. ♀♂: Include gender-relevant aspects in the evaluation.

Translated and adapted from: Blickhäuser, Angelika/ von Bargen, Henning (2001): Gender Toolbox. Berlin.

Tool 0.3.: Questionnaire according to five success factors

The following checklist has been developed to enhance the integration of the topics gender equality, poverty reduction, human rights and peace and security into the five success factors of Capacity WORKS, the GIZ management model for sustainable development. The questions complement the guiding questions from the Capacity WORKS manual[9] and the checklist on the status quo according to Capacity WORKS.

Success factor 1 - Strategy		**If yes, for which of the key issues?**	**For which of the key issues is there still need for action?**
1.1.	Do we know, which impact we want to and can achieve concerning the key issues gender equality, poverty reduction, human rights and peace and security?		
1.2.	Do we know the policies and strategies established in our partner country to enhance gender equality, human rights and security, to reduce poverty and violent conflict?		
1.3.	Is our strategic approach embedded in the above mentioned strategies (e.g. poverty reduction strategies, gender strategies, human rights strategies, reconciliation strategies) and does it contribute to the implementation of internationally agreed conventions and standards?		
1.4.	Is the living environment of different target groups known? • Do we know which target groups will profit from our development measure? • Are we aware of unintended negative impacts our approach might have on certain groups? • Do we consider the different impact our work might have on women and men, conflict parties and marginalized groups such as extremely poor, children, people with disabilities or ethnic minorities?		

[9] GIZ (year unknown): Capacity WORKS. The Management Model for Sustainable Development. Eschborn.

1.5.	Are analyses[10] available, which contain sufficient information on gender, poverty, human rights or peace and conflict? ▪ Do we have sufficient data on the prevalence, division, characteristics and depth of poverty and human rights violations? ▪ Is the data disaggregated according to gender and other characteristics to identify patterns of disadvantages or discrimination? ▪ Are underlying societal, political, cultural and economic causes of gender inequality, poverty, human rights violations and conflicts analysed? ▪ Are regional trends or patterns visible? ▪ Does our analysis include assessments how interventions can contribute positively or negatively on gender equality, poverty, human rights or (violent) conflict?		
1.6.	Does the strategy chosen secure the mainstreaming of the key issues gender, poverty, human rights and peace and security?		

Success factor 2 - Cooperation		**If yes, for which of the key issues?**	**For which of the key issues is there still need for action?**
2.1.	Do strategic partners for gender equality, poverty reduction, human rights and peace and security participate in the development measure?		
2.2.	Do (implementing) partners have sufficient		

[10] These could be baseline studies or other sources of information. Furthermore, there are specific analytical instruments such as gender analyses, peace and conflict analysis (PCA), ex-ante poverty impact assessment, poverty or social impact analysis(PSIA), human rights analysis, human rights impact assessment and combinations of the aforementioned.

	know-how and political will to promote the key issues?		
2.3.	Has the stakeholder system and its dynamic been analyzed? ▪ Are change agents identified? ▪ Are the relations between relevant stakeholder (positive and negative alliances) known? ▪ Can changes in power relations be expected as a result of the development intervention? ▪ Have possible resistances been anticipated and strategies to handle them developed?		
2.4.	Are the needs and interests of poor and marginalized population groups sufficiently incorporated? ▪ Are strategies for the cooperation with elected representatives developed? ▪ Can we contribute to transparency and accountability of state actors?		
2.5.	Do we cooperate with other donors on the integration of cross-cutting issues (harmonization)?		
2.6.	Do we support the establishment of networks to strengthen gender equality, poverty reduction, human rights and peace and security?		

Success factor 3 - Steering		**If yes, for which of the key issues?**	**For which of the key issues is there still need for action?**
3.1.	Are all relevant stakeholder, including marginalized groups, represented in the steering structure?		
3.2.	Is the result chain plausible in reference to the key issues?		

3.3.	Were possible risks considered?		
3.4.	Were measures developed to preclude or minimize negative impacts on marginalized groups?		
3.5.	Do we monitor the impact we have on gender equality, poverty reduction, human rights and peace and security?		
3.6.	When working directly with beneficiaries, were measures integrated to contribute to structural improvement of the situation of marginalized groups?		

Success factor 4 - Processes		**If yes, for which of the key issues?**	**For which of the key issues is there still need for action?**
4.1.	Do the processes support gender equality, poverty reduction, human rights and peace and security?		
4.2.	Are responsibilities for the implementation of the key issues clearly defined?		
4.3.	Are the relations of the key issues and the objectives of the development intervention coherently and comprehensively defined in the offer?		
4.4.	Is the methodological approach gender-, poverty-, human rights-, and conflict-responsive?		
4.5.	Are indicators formulated, which reflect the contribution on gender equality, poverty reduction, human rights and peace and security?		
4.6.	Can the monitoring be integrated into existing monitoring systems of our partners or other donors? Does it adequately reflect the key issues?		

Success factor 5 – Learning and Innovation	**If yes, for which of the**	**For which of the key issues**

		key issues?	is there still need for action?
5.1.	Do we support knowledge management on the key issues?		
5.2.	Do we use updated information on our sector and its interdependencies with the key issues?		
5.3.	Do we cooperate with other donors to generate data and know how on gender, poverty, human rights and peace and security?		
5.4.	Do progress reports integrate gender equality, poverty reduction, human rights and peace and security?		
5.5.	Do we support capacity development among our partner institutions and other relevant stakeholder?		
5.6.	Do we contribute to the mainstreaming of the key issues in the work of our partners?		

The checklist has been developed on behalf of the GIZ Sector Programmes Strengthening Gender Equality and Women's Rights, Realizing Human Rights in Development Cooperation, Millennium Development Goals and Poverty Reduction as well as Peace and Security.

Tool 0.4.: Non-sexist language

Gender-biased language is language that, either in grammatical use or direct statements, omits women or men and/or reinforces Masculine and feminine stereotypes. Non-sexist language (gender-generic, gender-inclusive, gender-neutral, or sex-neutral language) is language that attempts to refer neither to males nor females when discussing an abstract or hypothetical person, whose sex cannot otherwise be determined. The use of sexist language is often unconscious and unintentional but nonetheless damaging. The goal is to keep the language as inoffensive as possible. The assumption is that realities are shaped through the way we communicate and non-sexist language has the potential to transform gender relations.

It is often claimed that 'man' is a generic term, i.e. that it refers to all humans, male and female. However, certain male-specific words or phrases should be replaced by an equivalent gender-fair term.

Some examples of male-specific words:	Some examples of replacement terms:
▪ mankind ▪ man-made ▪ a man's job ▪ the common man ▪ man the register	▪ humankind, humanity, people, human beings ▪ synthetic, artificial, non-natural ▪ a difficult task, an arduous job ▪ the average person, ordinary people ▪ staff the register

Most job titles that were gender-specific terms in the past today have an equivalent gender-fair synonym.

Some examples of gender-specific job titles:	Some examples of gender-fair job titles:
▪ mailman ▪ stewardess/steward ▪ waitress/waiter ▪ saleswoman/salesman ▪ fireman ▪ policewoman/policeman ▪ congressman ▪ chairman	▪ mail carrier, postal worker ▪ flight attendant ▪ server ▪ sales representative, sales clerk ▪ fire fighter ▪ police officer ▪ congressional representative ▪ chair, chairperson, moderator

There are a number of ways to amend sexist language errors when dealing with pronoun usage.

Drop the gender-specific term altogether.	*Example:* The doctor should have a calming effect on **his patients.** *Correction:* The doctor should have a calming effect on **patients**.
Make the subject plural.	*Example:* Each **student** should bring **his** paper to class for a peer-edit. *Correction:* All **students** should bring **their** papers to class for a peer-edit.
Use one/one's to replace gender-specific terms. Be careful not to overuse this solution; it may have an effect on the tone of your paper.	*Example:* If **the student** attends the writing center, **his** writing will definitely improve. *Correction:* If **one** attends the writing center, **one's** writing will definitely improve.
Use both male and female pronouns (**him/her, his/her, and s/he**).	*Example:* The healthy athlete should get the appropriate amount of rest before **his** match. *Correction:* The healthy athlete should get the appropriate amount of rest before **his/her** match.
Change to the passive form	*Example:* He must return it by the due date. Correction: It must be returned by the due date.

Adapted from: University College Cork (1994): Non-Sexist Language. A Guide. Cork.

Tools 1: Gender training

Tool 1.1.: Quality criteria for gender trainings

Dimension	Aspects
Objectives ▪ Sensitization ▪ Qualification ▪ Transfer	▪ Enlargement of personal, thematic and social gender competences ▪ Identification and deconstruction of gender stereotypes ▪ Challenging sexism and social norm setting ▪ Acknowledgement of diversity among women and men ▪ Strengthening of ownership and participation ▪ Motivation to continue independent learning
Group ▪ Access ▪ Composition ▪ Relations	▪ Enablement of access of a diverse participants (e.g. sex, ethnicity, social strata, sexual orientation, generation, position in the organisation) ▪ Consideration of the group composition during the training ▪ Consideration of voluntary or compulsory participation ▪ Facilitation of dialogue between men and women as well as within women and men ▪ Reflection of gender roles in the group regarding power, responsibilities and care
Content ▪ Relevance ▪ Multidimensionality of gender ▪ Gender in organisations and programming ▪ Communication	▪ Practical relevance of the training and applicability to the workplace ▪ Consideration of intersectionality: Linkages with other social identity categories such as ethnicity, social strata, age, sexual orientation ▪ Reflection of diversity in gender constructions within and across societies ▪ Reflection of different power positions and implications of existing gender roles ▪ Technical capacities for situational and organisational gender analysis ▪ Gender and project management ▪ Gender in communication and interaction ▪ Exemplary application of the content on own workplace ▪ Development of gender-transformative strategies

Methodology ▪ Approach ▪ Proceeding ▪ Social structures ▪ Use of media and materials	▪ Employment of the experiences and realities of the participants ▪ Participation (e.g. inquiry of interests) ▪ Dialogue on objectives, content and methodologies ▪ Process orientation and reflection of the learning process ▪ Self-organized and guided learning, cooperative work settings ▪ Deconstruction of gender norms and differences through changes of perspectives ▪ Changes in the social setting (plenary, mixed groups of women and men, sex disaggregated groups) ▪ Avoiding gender stereotyping in the media employed ▪ Setting examples in the use of media
Facilitation ▪ Division of tasks ▪ Gender competence	▪ Facilitation by mixed male/female facilitators ▪ Transparent and balanced division of tasks between the facilitators ▪ Gender competence and experience of the facilitator (theoretical and practical gender knowhow, methodological capacities) ▪ Reflection and exchange with other gender trainers ▪ Use of non-sexist language
Structural and organisational framework ▪ Clarification of assignment ▪ Commissioning organisation ▪ Place and time ▪ Evaluation	▪ Clarification of multiple objectives and target group ▪ Definition of resources needed ▪ Clarification of existing or potential conflicts ▪ Institutional framework for gender mainstreaming ▪ Definition and reflection of place and time (accessibility, child care opportunities etc.) ▪ Evaluation requirements

Translated and adapted from: Heinrich-Böll-Stiftung (year unkown): Gender-Mainstreaming-Praxis. Arbeitshilfen zur Anwendung der Analysekategorie „Gender“ in Gender-Mainstreaming-Prozessen. Berlin.

Tool 1.2.: Gender alphabet

Objective:

Participants are briefly sensitized for gender dimensions and curious to learn more.

Instruction:

Divide the participants into two sex-disaggregated groups. The participants of each group stand in a row and run a relay to a poster on the opposite side of the room, which has a table with the alphabet. Each person writes down a word he or she associates with gender (e.g. **A**ge, **B**ehaviour, **C**harm, **D**ivision…), runs back and hands the pen to the next person. The group that finishes first has won.

After the relay, the results are reflected in the group. The terms provide anchors to deepen certain topics, such as the distinction between sex and gender, gendered division of labour, gender stereotypes…

Adapted from: Blickhäuser, Angelika/ von Bargen, Henning (2001): Gender Toolbox. Berlin.

Tool 1.3.: Gender stereotypes

Objective:

Participants improved their awareness and understanding about gender stereotypes.

Instruction:

Distribute the following handout and read the following questions; encourage participants to think about them individually and to take notes for each question:

a. Name two things you like to do that are considered typical for you as a man or a woman.
b. Name two things you do not like that are considered typical for you as a man or a woman.
c. Name two things you like to do that are considered non-typical for you as a man or a woman.

Encourage some participants to share their answers with the group; the no. of participants to talk will depend on group size. Take note of the responses on flip-chart. See whether any of the responses relate to strategic gender needs and particularly participation in public decision-making processes. Facilitate a discussion on the relevance of group responses for gender stereotypes.

Things I like that are considered typical for me as a man or woman

- _____
- _____
- _____
- _____
- _____

Things I do *not* like that are considered typical for me as a man or woman

- _____
- _____
- _____
- _____
- _____

Things I like that are considered *non-typical* for me as a man or woman

- _____
- _____
- _____
- _____
- _____
- _____

Source: GIZ/ARDP (2007): Training Resource Book Gender and Decentralization. Phnom Phen.

Tool 1.4.: Power Walk

Context

This exercise is a simulation of a community in 'development'. Everyone starts off equal, but ends up very different. The debriefing following the exercise allows participants to reflect on the way we construct certain stereotypes, to reflect what disparities exist and why and to consider how to address these disparities through planning and programming.

The issues that emerge during the debriefing guide later discussions on rights and duties and the capacities needed. Take everyone outside and give up to 27 participants each a piece of paper with a character from a typical community written on it. If there are fewer people to participate in the Power Walk, reduce the number of 'characters', making sure that you do not take too many out of one 'group' (e.g. all the powerful ones, or all the vulnerable ones).

This exercise could be used in the beginning of local planning sessions to sensitize everyone for the diverse needs and demands of different population groups as well as different access to power and decision-making.

Instructions

After reading out the statements, ask each one to move one step forward if the statement is true for their character and to stay where they are if it is not. Ask, who are those, who have come to the front. Discuss why they are at the front. Say that these are the people we normally meet when we go to the community. Ask the people at the back who they are. Ask how they felt as they watched all the others moving forward. If no one else points it out, say that the people at the back are those for whom the country program is intended. Lead a discussion on how to reach the people at the back when they go to the community. Because communities are very heterogeneous, it is important to make deliberate efforts to reach the poor and the marginalised, and especially the young. Ask what the outcome of the power walk tells us about the way in which we should work with communities during the country programme planning, implementation and evaluation. Ask what capacities the different people need in order to participate effectively or to listen to others. Agree on the different groups to talk to when visiting the community. The Power Walk not only allows people to identify marginalised groups and work out a strategy for including them in the process; it also clearly shows the power structure of the community – the subject of the role and pattern analysis that will come later.

Material

- Enough space inside or outside
- Characters on cards or stickers
- Statements

Time

Ideally 1 to 1 1/2 hours should be allowed for this exercise so as to allow enough time for thorough discussion.

Evaluation Questions

- Which patterns did you recognize during the POWER WALK?
- Which group of people did have access to power and decision-making?
- Who was excluded?
- How does everyday life of these persons look like?
- Which human rights were violated?
- Which gender specific patterns were visible?
- Which groups do we have to specifically consider during planning, implementation and evaluation of development measures?
- What do the marginalized groups need to participate equally in social life?
- How can these groups be strengthened ad integrated?
- How are the different groups reflected in our programme reality? In terms of attention and consideration?

Statements

1. I have voted for government officials.
2. I get to meet government officials.
3. I get to participate in local planning.
4. I can question expenditure of community funds.
5. I can read newspapers of my interest regularly.
6. I have time and access to radio and TV stations of interest for me.
7. I would never have to wait to meet municipal and administrative officials.
8. I don't have to hire a "fixer" to get my papers signed and released in time.
9. I have access to credit.
10. I can afford to by the food I like and go to restaurants.
11. I can buy condoms.
12. I can negotiate condoms use with my partner.
13. I went to secondary or I expect to go to secondary school.
14. I will be consulted on issues affecting young people in our community.
15. I can pay for treatment at a private hospital if necessary.
16. My opinion is respected and has weight in the municipality where I live.
17. My opinion is important when we are trying to resolve conflicts.
18. My opinion is important when we are trying to resolve conflicts.
19. I eat at least two full meals a day.
20. I sometimes attend workshops and seminars.
21. I am not in danger of being sexually harassed or abused.
22. I have never experienced physical violence in my life.
23. I expect to be safe in case of natural disasters.
24. I have some savings to recover from calamity.
25. I own property (land, store…).

POWERWALK characters

1. Village girl, 11
2. NGO worker, 25, in the city
3. Tribal chief, 70, in the village
4. Trafficked girl, 17, living abroad
5. Male leader of a youth group, 18
6. Midwife, 35, in a rural area
7. Grandmother taking care of orphans, 65, in the village
8. Orphaned boy aged 13
9. Female member of parliament, 53
10. A police woman, 42
11. 25 year woman who is HIV positive
12. Visually impaired young man
13. Male Newspaper editor, 57
14. Member of Commission on Human Rights
15. Street vendor, 36
16. 21 year man from the Mindanao working in the Manila
17. Married woman, 35 years

18. Girl aged 16 looking after sick mother and younger siblings
19. Mayor, 53, in the
20. GTZ officer, 39
21. Senior Finance Department Official
22. Wife of the mayor, 42
23. Migrant worker, 28, working in Dubai
24. Tenant, 25, in the Visayas
25. Land owner, 34, in the Visayas
26. Fisher men, 26
27. Owner of a commercial fishing vessel, 46

Please note: This exercise is especially valuable when adapted and localized to fit the specific context and aim of the group where the exercise is being used.

Adapted and amended to fit the Philippine context from: United Nations System Staff College. Year and place unknown.

Tool 1.5.: Generational changes

Objective: Participants are aware of changes in the role of women and men over time.

Instruction:

Ask participants to take a few minutes to reflect over changes in the role of women and men in their family as long as they can think back or know about; what was not possible many years ago and what is possible today. Ask participants to share their perceptions with the rest of the group and take note of the responses on flipchart. Ask them to think of two more changes in the respective society over the past five years; give them a few minutes to think about it. Take note of their responses on flipchart. Encourage them to think in particular of changes in the roles of women and men that have a effect on the corresponding sector of your intervention. Encourage participants to think ahead to the future. What might be possible some 10 or 20 years further?

What was not possible for women and men to do long ago (50 years)?

- _____
- _____
- _____
- _____
- _____

What was not possible for women and men to do 5 years ago?

- _____
- _____
- _____
- _____
- _____

What are the changes in the roles of women and men?

- _____
- _____
- _____
- _____

- _____

What might be possible in the future?

- _____
- _____
- _____
- _____
- _____

Source: GIZ/ARDP (2007): Training Resource Book Gender and Decentralization. Phnom Phen.

Tool 1.6.: Water buffaloes in Nepal

Objective:

Sensitize participants for the relevance of a gender analysis prior to planning and implementing development interventions.

Instruction:

The following example can be used in trainings. Divide the participants into small groups. They should read the case and discuss what they think has happened as a result of the intervention and why.

After a group discussion, read the real case to the participants.

A few years ago a European donor and a Nepalese environment NGO started to plan a project whose aim was to improve the level of health of the inhabitants of a rural community in Nepal and increase their economic self-sufficiency. Having conducted research about successful projects in other Nepalese regions and neighbouring countries, the idea was developed to raise water buffaloes. This had been done very successfully in other areas.

The European and Nepalese organisations were prepared to bring 20 water buffaloes to each village in the community – one buffalo for every four households. With the help of the buffaloes raised by the villagers, the project managers thought the following results would be achieved:

- The water buffaloes' nutritious milk would improve the poor nutritional state of the village children.
- Because of the income from sales of surplus milk there would be less need for the children to work and most of them could go to school.
- Income from the sale of surplus milk could be used to raise the standard of living of the village.

The project plan was presented to and discussed with the village leaders and it immediately received their approval. The buffaloes, too, were soon acquired and the villagers were taught how to look after them. The project started up and was in operation with the participation of the villagers in a very short time. After a year an outside evaluation team arrived at the village to assess the impact of the project. The results were a surprise to both organisations involved: The nutritional status of the children had declined, and fewer girls were attending school than before.

Source: The Centre for Development and Population Activities CEDPA (2000): Género, Salud Reproductiva y Defensa y Promoción. Manual de Capacitación. Washington D.C..

What do you think happened and why?

What happened?

The work of looking after the buffaloes and milking them had been left entirely to the women of the village and the burden of their tasks had thus grown enormously. The village men had taken part in the project by selling the buffalo milk at the Sunday market in the regional village centre. They had kept the sales income. Nor did the men know about the nutritional value the milk would have in the children's daily diet. Instead, having noticed that quite a good profit could be made from selling the milk, the men sold more and more of it in the local markets and the village was left with ever-smaller quantities of milk for the village families' own use. The children's state of chronic under-nourishment was not improved at all. Some men used part of the money to send a son to a better school. The village girls had to stay at home to help their mothers with the housework even more often, especially since taking care of the buffaloes took still more of the women's time.

Why did it happen?

The different roles of the men and the women in the village were not analysed at the project planning stage. So nobody noticed that looking after buffaloes was women's work and added to the girls' workload as well as the women's. Nor was it noticed that the men's overriding right to use the proceeds from sales of the milk was a factor that would tax the sustainability of the project. No investigation was made of the knowledge and understanding of the men and women about health and education issues.

Tool 1.7.: Gender integration continuum

Objective:

Sensitize participants for different levels of gender interventions and how these can either exploit or transform gender relations.

Instruction:

Break up into small teams of 4-5 people. Read the case study below. Review the case and decide if it exemplifies a gender *blind*, *exploitative*, *accommodating*, or *transformative* project. If not gender transformative, what could be done to examine, question, and change rigid gender norms to reach health as well as gender equity objectives? Explain the case each team discussed, where the project would lie along the gender integration continuum, and the recommendations for changing the project to make it gender transformative.

Case 1: Campaign to increase male involvement in Zimbabwe

In an effort to increase contraceptive use and male involvement in Zimbabwe, a family planning project initiated a communication campaign promoting the importance of men's participation in family planning decision-making. Messages relied on sports images and metaphors, such as "Play the game right; once you are in control, it's easy to be a winner;" and "It is your choice." The campaign increased the use of contraceptive methods. When evaluating impact, the project asked male respondents whether ideally they, their partners, or both members of the couple should be responsible for making family planning decisions. The evaluation found that while men were more likely to believe that they should take an active role in family planning as a result of the campaign, they did not necessarily see this as a topic for joint decision-making. Men interpreted the campaign as promoting the notion that family planning decisions should be made by men alone.

Case 2: Condom social marketing in Bolivia

The goal of a social marketing campaign in Bolivia was to increase condom sales. The campaign television spot featured a young man who said very proudly that he used a different colour condom with each of his several girl friends. The intended message was that he used condoms whenever he had sex, a "safe sex" message.

Case 3: Youth roles in care and support for persons living with HIV/AIDS (PLWHA)

In Zambia, a project aiming to involve young people in the care and support of PLWHA conducted formative research to assess the interest of young people in being caregivers, and to explore the gender dimensions of care. Young people were asked what care-giving tasks male and female youth feel more comfortable and able to carry out, and asked PLWHA what tasks they would prefer to have carried out by male or female youth. Based on this research, the project developed youth care and support

activities for PLWHA which incorporated tasks preferred by young women and young men.

Case 4: HIV/AIDS prevention in Thailand

This project provided education, negotiation skills, and free condoms to female commercial sex workers (CSW) in Thailand. Although knowledge and skills among CSWs increased, actual condom use remained low. After further discussions with the CSWs, project managers realized that CSWs weren't successful in using condoms because they did not have the power to insist on condom use with their clients. The project then shifted its approach and enlisted brothel owners, who had the power and authority to insist on condom use, as proponents of a "100% condom-use policy." Since the vast majority of brothels in the project region participated, the project resulted in a significant increase in safe sex practices.

Case 5: Female condom promotion in South Africa

A pilot programme was designed to increase the acceptability and use of the female condom. Historically, female condoms have been promoted to women. Acknowledging that men most of the times dictate the terms of heterosexual encounters, the programme decided to try an innovative approach: the promotion of the female condom to men by male peer promoters. This involved male promoters demonstrating to men the use of the female condom; explaining to men that self-protection and sexual pleasure are completely compatible with the use of the female condom, and giving female condoms to the men to use with their female partners. Staff based their programmatic approach on research showing that men are preponderantly concerned with retaining control over the means of protection against HIV and sexual transmitted diseases (STIs), while they remain ambivalent about female-controlled methods. They wanted their women to be protected from STIs, including HIV, but the threat of infection was seen as ensuring that women remained faithful.

Answer Case 1: Campaign to increase male involvement in Zimbabwe

Exploitative: The intention was to convey to men that family planning is a topic about which they should be concerned. However, the messages used emphasized those aspects of masculinity that speak to men's power: winning in sports, being in control, and making decisions. Men came away from the campaign with the unintended message that they should be in control of family planning decisions, which further limited women's participation in family planning and responsive decision making and couple communication, and undermined the objective of increasing men's role as supportive partners.

Answer Case 2: Condom social marketing in Bolivia

Exploitative: The TV spot capitalized on social and cultural values supporting men's virility, sexual conquest, and control. It reinforced the stereotype that "macho" men have multiple female sexual partners and undercut the notion that joint communication and decision making, negotiation, and mutual respect are important for safe sex

behaviours. It also contradicted other health efforts to promote safe sex practices through partner reduction.

Answer Case 3: Youth roles in care and support for persons living with HIV/AIDS

Accommodating: The programme was successful in engaging both young women and young men in providing care and support with which PLWHA are comfortable. This project divided tasks according to the existing gendered division of labour, but also according to the desires of PLWHA. The programme accommodated existing gendered divisions of labour, but missed an opportunity to engage young men in a care-giving role, creating the potential for a more transformative outcome.

Answer Case 4: HIV/AIDS prevention in Thailand

Accommodating: This project accommodated the lack of power that female sex workers had over their clients and used the power of male brothel owners to demand 100 percent condom use on their premises. While the approach did not challenge the power differentials between sex workers and brothel owners, it did force more protective health behaviour on the male clients.

Answer Case 5: Female condom promotion in South Africa

Exploitative: This programme had an explicit intention of empowering men to use a technology that was developed so that women would have more control over decisions about contraception and protection from sexual transmitted diseases and HIV. It exploited men's greater power over decisions about sexuality and reproduction to achieve a health outcome, and reinforced men's control over the means of protection as well as the norm that allows men to have multiple partners while women are expected to remain faithful. While some may interpret this project as accommodating rather than exploitative, since it engaged men around the use of a method ostensibly controlled by women, the programme was grounded in research that men's interest in any method was likely to be based on maintaining control over their partners' sexuality.

Source: Population Action International (2010): A Practical Guide for Integrating Gender into HIV/AIDS Policies and Programmes. Washington D.C..

Tools 2: Gender analysis

Tool 2.1.: Gender analytical framework

Roles	Reproductive		Productive		Community		Political	
	Women	Men	Women	Men	Women	Men	Women	Men
What are the existing tasks and contributions of women and men*in each role?								
Resources What resources do women and men*: Have access to? Have control over? What benefits, status, do women and men* get from each role?								

Gender inequalities and needs

- What gender inequalities and needs are expressed in each role, by women/men?
- What gender inequalities and needs are not so easily expressed by women/men?
- What inequalities/needs are directly linked to the intervention (e.g. accessibility criteria)?
- What inequalities/needs are context-specific (e.g. cultural values, traditions etc.)?

*Disaggregate women/men according to socio-economic characteristics such as age, income level, ethnicity, religion, marital status, household structure, level of education, professional occupation etc. whenever and as relevant.

Adapted from: SDC (2003): Gender Analytical Framework. Zurich.

Tool 2.2.: The 3-R-method

This method was developed on the basis of experiences in different Swedish local authority districts to systematically assess the gender relevance of interventions and projects before they were actually implemented. The 3 R stand for **representation, resources and realisation**. They imply at the same time the steps to be undertaken when using this method. 1. Collection of gender relevant data, 2. Defining the available resources, 3. Appraisal of opportunities to realise the intervention and at the same time the legal framework has to be considered.

Representation

- How are women and men affected by the problem and potential intervention?
- How are women and men distributed horizontally (based on hierarchical levels) and vertically (based on divisions, departments) in the sector and the implementing organisation?
- How well represented are they on boards and committees?
- How involved are they in professional development schemes and in informal meetings such as regular get-togethers or company parties?

Resources

What resources are available to women and men? This should take account of the following, for example:

- Time resources (e.g. use of a sport hall, service, consultation times)
- Space (e.g. office space, leisure facilities, recreational areas, parking)
- Information
- Money
- Political and economic power
- Education and training
- Job and career
- New technologies (e.g. computer equipment)
- Health care
- Housing conditions
- Transport facilities/mobility

Realisation

- Which gender norms and principles dominate the corresponding sector?
- What is the nature of the project output: does it appeal more to women or men?
- What possible explanations are there for the quantitative analysis results from the areas of “Representation” and “Resources”?
- To what extent does the dominant value structure of the organisation, project, and network play a role?
- What norms and values influence the gender roles in the organisation or specific project (division of work according to gender, attitude and behaviour of men and women, disparities in the valuation of men and women or of “male and female characteristics”)?

Adapted from: Swedish Association of Local Authorities (1999): The 3Rs-Tool for Gender Equality in Local Government. On Gender Mainstreaming and the 3R method in Swedish Municipalities, Stockholm.

Tool 2.3.: Gender impact assessment (GIA)

Gender impact assessment (GIA) is a core tool for implementing gender mainstreaming. It helps to estimate the different effects (positive, negative or neutral) of policies or activities on gender equality.

GIA should be carried out at an early stage in the policy decision-making process (before the approval and implementation of a programme) so that the policy can be adapted or reoriented. This is especially true in case of neutral or negative effects, helping the decision-makers to choose between:

- alternative scenarios (derived from differing estimates of the gender outcomes of the actions to be launched);
- alternative programmes and projects;
- alternative methodologies for carrying out the same programme or project.

The elements identified by GIA can be also used at the end of the policy cycle, during ex post evaluation, in order to make a comparison with the outcomes actually reached.

The general purposes of GIA are to:

- help in planning to identify intervention strategies that take into account gender equality;
- verify planning quality in terms of gender equal opportunities;
- contribute to overall policy evaluation according to gender mainstreaming principle.

More specific purposes are concerned with identifying:

- the requirements, with regard to gender equal opportunities, that are intended to be met in planning (a policy, a programme, an activity) and therefore what are the priorities and the issues on which planning choices should have founded on;
- the context largely determined by the impact of the activities planned in previous years to which programming documents refer when defining goals and choices in terms of equal opportunities;
- the potential impact, within this context, that planning choices might have on promoting gender equal opportunities.

In the case where GIA results are used during ex-post evaluation, the aim is that of evaluating whether effective outcomes confirm, enhance or invalidate potential ones.

Steps of a gender impact assessment

Gender Impact Assessment is a complex and multidimensional process each element of which involves different steps, different approaches and methodologies.

Step 1: Analysis of the present situation

Determining the initial position of individuals in a certain context (at cultural, social, political and economical level) by gender with respect to the four dimensions by which gender inequality can be assessed: participation, resources, norms and values and rights.

This initial assessment should determine the intensity of the gender equality deficit and thereby feed into determining the priority to be attached to gender equality in the formulation, the monitoring and development of the policy measures. The initial assessment also provides a benchmark against which to assess policy outcomes. This step requires competencies of context analysis in a gender perspective and the defining of a set of gender sensitive monitoring indicators.

Step 2: Analysis of future trends

The initial situation prior to the implementation of policy needs to be considered from a dynamic and not solely a static perspective, assessing the trends in male and female positions independently of the effects of any proposed policy in order to understand the future context for policy and to identify which tools are more likely to achieve desired performance. Future risks and past trends must be taken into account, as well as any contradictory directions trends in gender deficits that may be operating.

Step 3: Determining priority

The assessment of the current degree of inequality (step 1) and of future trends in terms of impact on men and women (step 2) helps to determine which priorities should be considered to actively promote gender equality and increase positive impact on women and men. The main goal of the third step is determining priority to the range of policies that actively promote gender equality through an assessment of the current degree of inequality and its potential impact on women and men. It is important to underline that some policy measures may consider gender equality as the main objective, while others may consider it to be subsidiary or may have no specific commitment to gender equality. Even in this latter case, the impact on gender equality should still be evaluated. In addition, it is important to consider that policies that are presented as gender neutral may have important indirect effects on women.

GIA allows a judgment of value for any policy, measure or intervention through the potential impact on women and men in order to put in evidence elements to enhancing equal opportunities and gender mainstreaming and to underline specific space of interventions that should be considered in a gender perspective (Step 4).

Throughout this process, it is worth remembering that promotion of equal opportunities is a very complex policy because, to act, it may be necessary to modify the cultural perspectives of a given society, its mentality and behaviour patterns. The promotion of equal opportunities should be applied not only to policies that are explicitly able to encourage - through specific measures - equal opportunities, but also to policies that - through indirect measures - can change mentality and behaviours models, producing positive effects on women.

If GIA is applied to policies, measures or interventions that consider women as a direct target, we will speak of direct potential impact (step 5); if GIA considers the potential effects that any policy, measure or intervention may have on the society in general identifying, at the same time, which variables may have an un-direct effects on female population, we will speak of indirect potential impact (step 6).

Step 4: Assessing general impact of the programme

The fourth step is that of assessing the potential gender impact of the programme with reference to participation, resources, norms and values and rights. At this level a general and overall evaluation of the programme specific approach in term of equal opportunity and gender mainstreaming should take place and should consider:

- characteristics and modalities of the strategy identified to take into account gender equal opportunities policies and to internalise the principle of gender mainstreaming;
- presence/absence of modalities of gender analysis for the analysis of the context and of the outputs of previous programming periods;
- characteristics and modalities of specific fields of intervention considered to be of primary concern both for gender equal opportunities policies and to internalise gender mainstreaming principle;
- policy implications as concerns gender equal opportunities policies and gender mainstreaming principles within the programme objective.

Step 5: Assessing specific direct impact of the programme

The fifth step is that of assessing the impact of the policy on particular groups of women and men. Policy target groups, as well as potential populations, should be disaggregated by gender and within gender. In many cases, the importance of addressing specific policies also to specific target groups within the women general group, for example, has been revealed an important tool to increase positive impact.

Example:

For example, it might be useful to consider labour participation models and differences in opportunities and choices across different groups/typologies of women for example women who do not want to enter the labour market, women who are willing to participate only with certain conditions, women who are entering into the labour market for the first time, women who are re-entering into the labour market after an interruption, women who are in the labour market and want to remain in it. Age and education variables have often been considered with attention given to their relevance in affecting participation decisions. In addition, the role of variables determined by family conditions has also been considered (presence of spouse, small children, other family dependants, etc.), together with working conditions.

Step 6: Assessing specific un-direct impact of the programme

The sixth step is that of assessing the indirect impacts of the current state of gender inequalities and the proposed policies.

Step 7: Defining further development

The seventh step is that of identifying ways in which a policy might be redesigned to promote gender equality, to determine where the policy is assessed to have a negative impact on gender equality and/or to be broadly gender neutral.

To be effective, policy-making must be a learning process that involves finding out what works and what does not, taking corrective action to redress imbalances and making sure others can learn from the experience. This means feeding-back the lessons learned from evaluation to other policy-makers. The realistic consideration of the impacts of reasonable alternatives must be evident in any final recommendation to policy makers.

Step 8: Defining a set of gender sensitive evaluation indicators

The definition of gender sensitive indicators is necessary to identify the essential data that will be useful for the comparison between potential and effective impacts of a programme.

Adapted from: European Commission (year unknown): Evaluating Socio Economic Development, SOURCEBOOK 2: Methods & Techniques. Gender Impact Assessment. Brussels.

Tool 2.4.: Stakeholder analysis with a gender perspective[11]

Stakeholders (and beneficiaries) are individuals or groups with a direct, significant and specific stake or interest and who affect or will be affected – positively or negatively – by a particular issue, goal, undertaking or outcome.

Stakeholder analysis is a crucial initial step in situation analysis. It identifies all primary and secondary stakeholders who have a vested interest in the issues with which the intervention is concerned. The goal of stakeholder analysis is to develop a strategic view of the human and institutional landscape, and the relationship between the different stakeholders and the objectives under consideration. Stakeholder analysis is best seen as a continuing process, which should engage different groups, as issues, activities, and agendas evolve. Determining who needs or wants to be involved, and when and how it can be achieved is the first step in any collaboration effort. It is fundamental that enough time be budgeted to explore stakeholder views, values and perspectives so that a clear understanding of the human and institutional landscape can be established. Once stakeholder views are understood, a decision can be made on whether or not to pursue collaboration. As real situations are dynamic, it will be important to validate and revalidate a stakeholder group profile over time. The stakeholder assessment is also an appropriate time to explore whether or not gender will be a factor in the elaboration and implementation of future efforts.

The following table on the following page can be used to structure a stakeholder analysis. This has the advantage of helping you to think through the variety of groups that may be affected by the initiative in question, and then to probe the interests of each group more fully, with an end result of better knowing and understanding the full range of stakeholders who may have an interest in a given initiative, policy or project.

Begin by brainstorming all possible stakeholders, including stakeholder from the governmental and non governmental gender machinery. Then research the human environment. Talk to various stakeholders, and ask them who they would see as potential stakeholders for the initiative in question. This list of stakeholders would go in the first column of the stakeholder analysis table. Possible gaps, e.g. a lack of gender balance among the identified stakeholders should be analysed and addressed. It may grow or shrink as your analysis progresses, and your understanding deepens. The next step is to learn about each stakeholder group in as much depth as possible. The analysis involves determining:

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[11] **Note:** There are different tools for stakeholder analysis. Regarding the inclusion of a gender perspective, it is important to identify gender imbalances among the stakeholder, to include gender actors (governmental, civil society, academe) – depending on the context as primary or secondary stakeholder - and to consider their gender capacities. In a second step, capacity building measures should be planned to fill potential gaps concerning gender awareness.

Primary or direct stakeholders: Those who, because of power, authority, responsibilities or claims over the resources, are central to the initiative at hand. As the outcome of any action will affect them directly, their participation is critical. Primary stakeholders can include local community-level groups, private sector interests, local and national government agencies, etc. This category also includes powerful individuals or groups who control policies, laws or funding resources, and who have the capacity to influence outcomes. Failure to involve primary stakeholders at the start can lead to subsequent difficulties in achieving desired outcomes.

Secondary or indirect stakeholders: Those with an indirect interest in the outcome. They may be consumers, donors, national government officials and private enterprises. Secondary stakeholders may need to be periodically involved, but need not be involved in all aspects of planning and/or implementing the initiative.

Opposition stakeholders: Those who have the capacity to affect outcomes adversely through the resources and influence they command. It is crucial to engage them in open dialogue.

Marginalized stakeholders: Such as women, indigenous peoples, and other impoverished or disenfranchised groups. They may be primary, secondary or opposition stakeholders, but they lack the recognition or capacity to participate in collaboration efforts on an equal basis. Particular effort must always be made to ensure their participation.

The nature and limits of each stakeholder's stake in the project, e.g., livelihoods, profit, lifestyles, cultural values, spiritual values.

The basis of the stake, e.g., customary rights, ownership, administrative or legal responsibilities, intellectual rights, social obligations.

Resources that each stakeholder has at their disposal and could bring to the initiative.

The **potential role(s)** in the initiative, if any, of each stakeholder.

Any **capacity gaps** that may need to be filled so that the stakeholder can fulfil their role. This will form the basis of the initiative's capacity-building strategy.

Stakeholder Analysis Table							
Stakeholder	**Type**	**Marg.**	**Stake**	**Basis**	**Resources**	**Role**	**Gaps**

[1] Type = Primary (P) or Secondary (S). Also note here if this group is an Opposition (O) stakeholder
[2] If the stakeholder is a marginalized group, put an "M" in this column; otherwise leave blank.
[3] The nature and limits of the stakeholder's stake in the initiative – e.g., livelihoods, profit, lifestyles, cultural values.
[4] The basis of the stake – e.g., customary rights, ownership, administrative or legal responsibilities, intellectual rights, social obligations.
[5] Resources that the stakeholder has at their disposal and could bring to the initiative, including gender competence.
[6] The potential role(s) in the initiative, if any, of the stakeholder.
[7] Any capacity gaps that may need to be filled so that the stakeholder can fulfill their role. Such capacity gaps can also include a lack of gender awareness. Capacity building measures should be planned to fill the gaps.

Adapted from: Gawler, Meg (2005): Quick Guide to Stakeholder Analysis. Place unknown.

Tool 2.5.: Daily activity chart

The following chart can be used as an analytical tool for gender analyses. Daily activity charts - or 24 hour clocks - show how people spend their time over the course of a day. Time can be shown in hours or parts of the day, for example morning, afternoon or evening. Daily activity charts be created by the beneficiaries themselves. However, they can also be created on behalf of “typical people” in the community – such as a mother and market vendor, school boy, business person or farmer. It should be ensured that the data is not only grounded on stereotypical assumptions.

Daily activity charts are a useful tool to:

- Compare how different people spend their time – for example, by showing how gender, marital status or social class can affect how people spend their work and leisure time;
- Identify when and where activities happen;
- Plan project activities – by helping to identify the best time to work with particular groups.

Exemplary daily activity chart for the comparison of male/female:

Time	Male	Female
5:00		
6:00		
7:00		
8:00		
9:00		
10:00		
11:00		
12:00		
13:00		
14:00		
15:00		
16:00		
17:00		
18:00		
19:00		
20:00		
21:00		
22:00		
23:00		

Source: GIZ/ARDP (2007): Training Resource Book Gender and Decentralization. Phnom Phen.

Tool 2.6.: Table 2: Framework for relating budgets to gender equality

Focus	Accounting for gender	Data/information required
Inputs (money appropriated and spent)	Are the inputs adequate to achieve gender equality as well as other objectives?	▪ Sex-disaggregated data ▪ Output and impact objectives and indicators – may need improvement by identifying sources of relevant statistics ▪ Understanding of gender relations ▪ Dialogue between government officials and civil society recommended as one of the approaches to achieving understanding ▪ If the answer to the questions is NO, then changes need to be identified in all four areas to close the identified gender gaps.
Activities (services planned and delivered, e.g. health services, enterprise support, social transfers etc)	Are activities designed to be equally appropriate to women and men? Are activities adequate to achieve gender equality, as well as other objectives?	
Outputs (planned and delivered utilization of the activities, e.g. patients treated, business supported, incomes increased, etc.)	Are outputs fairly distributed between women and men? Are the outputs adequate to achieve gender equality, as well as other objectives?	
Impacts (planned and actual achievements in relation to broader objectives, e.g. healthy people, competitive businesses, poverty reduction)	Do the impacts promote gender equality, as well as other objectives?	

Source: Elson, Diane (2002): Gender-responsive budget initiatives: Some key dimensions and practical example. In: Gender budgeting initiatives, strategies, concepts and experiences. Papers from a high-level international conference "Strengthening economic and financial governance through gender responsive budgeting". Brussels.

For further information please refer to: GIZ (2006): Manual for Training on Gender Responsive Budgeting. Eschborn.

Tool 2.7.: Gender-relevant elements of ToR for project/programme assessments

- Disaggregate all data, tables, etc. According to sex and specify other relevant factors such as age, ethnicity or socio-economic strata
- Analyse the relevant national and international policy framework to identify the framework for gender equality
- Integrate gender into situational analysis or undertake a separate gender analysis, e.g. gender impact assessment
- Identify and integrate gender-concerns in objectives and, if feasible, formulate additional gender equality objectives
- Identify gender-sensitive indicators, if feasible, formulate additional gender indicators and identify means of verification
- Develop a gender-sensitive logical framework
- Identify strategies for mainstreaming gender throughout the project
- Include gender in the mission report either mainstreamed in the text or as a separate section
- If feasible, identify corresponding OECD/DAC gender marker

Tools 3: Planning

Tool 3.1.: Engendering the logical framework

The logical framework (logframe) is an analytical tool used to plan, monitor, and evaluate projects. It derives its name from the logical linkages set out by the planner(s) to connect a project's means with its ends. The logframe is only one monitoring and evaluation tool and its use does not pre-empt the use of other evaluation tools. Compared to most other project management tools, the logframe has the potential to organize a considerable amount of information in a coherent and concise manner. The logframe was originally developed by the United States Department of Defense, and adopted by the United States Agency for International Development in the late 1960s. Since then, it has been applied and modified by many bilateral donors, including Germany, the United Kingdom, the European Union, Canada, and Australia. While avoiding advancing any one particular template, there are simple ways in which to understand what the logframe is, and why it is relevant to monitoring and evaluating projects. The logframe can be a useful and durable tool for project management, but a gender-blind logframe will counteract project performance and fail to report gender-related achievements. Engendering the logical framework is about identifying and accounting for the gender issues implicit in the planning, monitoring, and evaluation of research and development projects.

The generic logical framework matrix

	Narrative summary	Objectively verifiable indicators	Means of verification	Important assumptions and Risks
Development Objective				
Project or programme objective				
Outputs				
Activities		Inputs		

The *development objective* is stated in broad terms. It is an aim that the project anticipates reaching and it must be related to a specific national development priority. The second row of the logframe lists the *objectives of the project*. The third row of the logframe encompasses its *outputs*, or the results anticipated by the project. Finally, the fourth row is a list of project *activities* that relate to each of its outputs.

In the first column, the *narrative summary* describes the project's goal, purpose, outputs and activities. In the second column are the objectively verifiable indicators for each level of the project. Indicators must also specify quantity, quality, and timing. These measures must be capable of being substantiated, and the sources of information for this task are indicated in the third column, referred to as *means of verification*. In the fourth and final column are the critical *assumptions.* These are contextual and content-related factors that influence the project. Finally, it is noted that at the level of activities, under the second column, the logframe requires not indicators, but the identification of *inputs* or goods and services required for project

implementation, and without which the project cannot achieve its activities, outputs, purpose, and goal. The importance of this statement of inputs will be taken up below.

In project planning, a logframe is typically shaped by working “top-down” through the matrix. First, the ultimate goal is defined, followed by the purpose of the project, then the outputs needed to achieve the goal, and finally, the activities and inputs needed to achieve the outputs.

Gender analysis and the logframe

Opening up the logframe to review by project stakeholders and beneficiaries is only part of making the tool more appropriate. The logframe must also incorporate an awareness of the social relations that are intrinsic to project implementation, monitoring, and evaluation. The task is to converge the gender analysis and the logical framework to improve gender equality.

An *engendered logframe* requires that the process of planning a project, as well as each component of the logframe matrix, be seen through a “gender lens”, which is informed by a gender analysis. Incorporating gender analysis in the project management process requires that it be clearly reflected in the logframe. In effect, preparation of an engendered logical framework matrix involves project planners, stakeholders, and beneficiaries in analyzing gender relations and addressing questions at each level of the framework. This analysis takes place not only once during project start-up, but throughout the course of monitoring and evaluation, keeping in mind that the logframe is both adjustable and applicable to long-term project management.

Questions for engendering the logframe

	Narrative summary	Objectively verifiable indicators (OVIs)	Means of Verification (MOVs)	Important assumptions and Risks
Development objective/ Indirect result	Do gender relations in any way influence the project goal?	What measures can verify achievement of the gender-responsive goal?	Are the data for verifying the goal sex-disaggregated and analysed in terms of gender? What gender analysis tools will be used (e.g., in impact assessment)?	What are the important external factors necessary for sustaining the gender-responsive goal?
Project or programme objective/ Outcome	Does the project have gender-responsive objective(s)?	What measures can verify achievement of the gender-responsive objective(s)?	Are the data for verifying the project purpose sex-disaggregated and analysed in terms of gender? What gender analysis tools will be used (e.g., in Rapid Rural Appraisal exercises)?	What are the important external factors necessary for sustaining the gender-responsive objective(s)?
Outputs	Is the distribution of benefits taking gender roles and relations into account?	What measures can verify whether project benefits accrue to women as well as men, and the different types of women engaged in or affected by the project?	Are the data for verifying project outputs sex-disaggregated and analysed in terms of gender? What gender analysis tools will be used (e.g., in participatory field evaluations)?	What are the important external factors necessary for achieving project benefits (specifically, benefits for women)?
Activities	Are gender issues clarified in the implementation of the project (e.g., in workplans)?	Inputs: What goods and services do project beneficiaries contribute to the project? Are contributions from women as well as men accounted for? Are external inputs accounting for women's access to and control over these inputs?	Are the data for verifying project activities sex-disaggregated and analysed in terms of gender? What gender analysis tools will be used (e.g., in monitoring the activities)?	What are the important external factors necessary for achieving the activities and especially ensuring the continued engagement of men and women participants in the project?

Engendering the logframe recognizes that both male and female participants are seen as active, rather than passive beneficiaries of the project. In other words, participants are social agents who bring to the project their own agenda, constructive or destructive, their own resources and knowledge, as well as their own interpretation of activities. This awareness can be reflected in the logframe in various ways. For instance, project "inputs" must reflect the resources brought to the project by its

participants. These may be expressed as quantifiable goods and services such as units of labour. Another example of recognizing project participants as social agents takes into account the complementary and competing knowledge of women and men. In the logframe this is reflected in the types of activities prioritized in the project. For example, in an agricultural research project, male farmers often encourage the project to focus on crops or animals that they control (e.g., industrial crops or grade cattle). In contrast, women farmers may prefer activities from which they can directly generate income (e.g., sale of food crops or poultry). Possibly, both types of activities are included in the logframe and reported on through use of appropriate indicators and means of verification. Suitable indicators, means of verification, and assumptions are designated for these complementary gender roles with a recognition that “women” themselves are not necessarily a homogeneous social group.

Adapted from: Hambly Odame, Helen (2001): Engendering the Logical Framework. The Hague.

Tools 4: Implementation

Tool 4.1. Eight guiding principles for a gender-sensitive implementation

I. Recognition: Gender issues permeate all aspects of international co-operation, its management systems, personnel policies, organisational culture and working methods and the issues it addresses, from policy planning, programming and implementation to evaluation. Acknowledging this fact is necessary to tackle the systemic barriers to gender equality;

II. Diversity and intersection: Policies, programmes and projects affect women and men differently but not all women and all men experience the same form of gender-based discrimination and marginalization. Sub-groups of men and sub-groups of women (e.g. depending of age, ethnicity, cultural practices etc) may experience specific gender inequalities that must be acknowledged and documented to be adequately addressed;

III. Equality: Gender equality requires the protection and promotion of human rights for all: the rights of young and adult men and women, boys and girls. Equality also implies ensuring equal opportunities;

IV. Equity: Specific measures that favour the most disadvantaged sex must be designed to eliminate disparities between the sexes, sexist-stereotypes and discrimination. Equity compensates for unequal opportunities and guarantees the fairness of our programmes (equity leads to equality);

V. Empowerment and agency: Individual and collective empowerment is central for boys, girls, young and adult women and men to meet their immediate practical needs as well as their long-term strategic interests. It begins with consciousness-raising and leads to self-realization. Development actors must support processes that increase women's and men's self-confidence, develop their self-reliance, and help them set their own agendas;

VI. Participation and parity: Equal participation of young and adult men and women as agents of change in economic, social and political processes is essential to achieving gender equality;

VII. Partnership between women and men: Empowering women does not mean excluding men. It is about partnerships between women and men that empower both sexes. This implies giving an equally pivotal role to men and women in creating more equal societies;

VIII. Social justice: Though gender inequality breeds poverty, anti-poverty measures alone cannot redress gender inequalities. Poverty reduction efforts must be coupled with actions to eliminate gender inequality in order to be truly effective.

Adapted from: UNESCO (2002): UNESCO'S Gender Mainstreaming Implementation Framework (GMIF) for 2002-2007. Paris.

Tool 4.2.: Checklist for the integration of a gender approach into activity planning and monitoring

This checklist supports gender sensitive planning, monitoring and evaluation of activities and publications. The checklist is based on a traffic light system. It allows the comparison between planned and evaluated effects at one glance. The checklist is divided into three sections. For each section, indicate if there is a need for action and your response to that need – before implementing the activity (planning) or as a lesson learned for similar activities in the future (monitoring and evaluation). If a question is not applicable to a certain activity, just leave the answers blank and write a short remark, why that is the case.

If you answer a question with „Yes“ (green): There is no need for action.

If you answer a question with „Partly“ (yellow): Reflect why this questions can only partly be answered with yes, and consider adaptation of your activity.

If you answer a question with „No“ (red): This answer often indicates the need to act. You should rethink your planning and eventually plan differently.

1. General gender orientation			
Planning		Monitoring and Evaluation	
1.1. Is our planning based on realistic gender related objectives?	□ No □ Partly □ Yes	□ No □ Partly □ Yes	1.1. Was our planning based on realistic gender related objectives?
1.2. Does the agenda/topic of the activity reflect the needs and interest of men and women, different interest groups, conflict parties, ethnic or religious groups or minorities?	□ No □ Partly □ Yes	□ No □ Partly □ Yes	1.2. Did the agenda/topic of the activity reflect the needs and interest of men and women, different interest groups, conflict parties, ethnic or religious groups or minorities?
1.3. Is the content and methodology of the activity gender responsive?	□ No □ Partly □ Yes	□ No □ Partly □ Yes	1.3. Was the content and methodology of the activity gender responsive?
1.4. Do we need more background information on gender related to the topic?	□ No □Partly □ Yes	□ No □ Partly □ Yes	1.4. Did we have enough background information on gender related to the topic?
Indicate if there is a need for action and your response to that need – before implementing the activity (planning) or as a lesson learned for similar activities in the future (monitoring and evaluation).		From the recommendations (on left-hand column), which adjustments have been made and what are the results? If none were made, explain why?	
How would the actions that you are proposing help achieve and/or enhance the outcomes and impact you hope to achieve in your results chain?		How did the actions implemented help achieve or enhance the outcomes and impact of the project/programme?	
2. Strategy and cooperation			
Planning		Monitoring and Evaluation	
2.1. Is our activity/topic embedded in the	□ No	□ No	2.1. Was our activity/topic embedded in

gender related strategies of partners and other donors?	□ Partly □ Yes	□ Partly □ Yes	the gender related strategies of partners and other donors?
2.2. Are actors included that could serve as change agents/ resource persons for the gender related aspects? If feasible, do the ToR reflect that role?	□ **No** □ Partly □ Yes	□ **No** □ Partly □ Yes	2.2. Did the respective actors serve as change agents/ resource persons for the gender related aspects?
2.3. Will the time, location, place, region or community of the planned activity be acceptable and secure for all participants and target groups?	□ No □ Partly □ Yes	□ No □ Partly □ Yes	2.3. Did the time, location, place, region or community of the activity allow all envisaged participants and target groups to participate?
2.4. Will different target groups participate in the (planning of the) activity or will they be consulted for their perspectives, needs and interests?	□ **No** □ Partly □ Yes	□ **No** □ Partly □ Yes	2.4. Did different target groups participate in the activity or were they consulted for their perspectives, needs and interests?
Indicate if there is a need for action and your response to that need – before implementing the activity (planning) or as a lesson learned for similar activities in the future (monitoring and evaluation).			From the recommendations (on left-hand column), which adjustments have been made and what are the results? If none were made, explain why?
How would the actions that you are proposing help achieve and/or enhance the outcomes and impact you hope to achieve in your results chain?			How did the actions implemented help achieve or enhance the outcomes and impact of the project/programme?
2. Learning and innovation			
Planning			Monitoring and Evaluation
5.1. Are gender related aspects integrated in the monitoring approach for this activity?	□ No □ Partly □ Yes	□ No □ Partly □ Yes	5.1. Did the monitoring approach for the activity capture gender related aspects (possible positive and negative impacts)?
5.2. Does the evaluation tool include gender related concerns?	□ No □ Partly □ Yes	□ No □ Partly □ Yes	5.2. Did the evaluation of the activity reflect gender?
5.3. Is gender included in the knowledge management or documentation of the activity?	□ No □ Partly □ Yes	□ No □ Partly □ Yes	5.3. Was gender included in the knowledge management or documentation of the activity?
Indicate if there is a need for action and your response to that need – before implementing the activity (planning) or as a lesson learned for similar activities in the future (monitoring and evaluation).			From the recommendations (on left-hand column), which adjustments have been made and what are the results? If none were made, explain why?
How would the actions that you are proposing help achieve and/or enhance the outcomes and impact you hope to achieve in your results chain?			How did the actions implemented help achieve or enhance the outcomes and impact of the project/programme?

Adapted from: GIZ Decentralization Programme Philippines (2010): Checklist for Planning and Monitoring of Activities. Manila.

Tool 4.3.: Sample terms of reference (ToR) for gender focal points

- Consult project or programme management in the planning, implementation, monitoring and evaluation of a gender approach
- Raise awareness for gender issues among colleagues and partners
- Lobby for the integration of a gender approach and the consideration of the needs and interests of marginalized groups
- If necessary, suggest additional (internal) objectives and indicators that reflect the gender approach
- Network with national gender machineries, civil society organisations and academe
- Identify and support capacity building efforts within the team and among counterparts
- Ensure the integration of a gender perspective in reporting
- Support knowledge management through the compilation and dissemination of lessons learned and promising practices
- Ensure the integration of a gender perspective for in terms of reference for appraisal missions, studies and evaluations
- Identify and broker gender specialists, if necessary
- Launch or participate in gender quality circles

Tools 5: Monitoring and evaluation

Tool 5.1.: Checklist for the main stages of the design and implementation of a monitoring or evaluation study

The following checklist illustrates the key questions for the integration of a gender approach in the design and implementation of monitoring and evaluation studies.

Stage of the study	Key question to be answered
1: Why is the study being conducted?	■ Why is the study being conducted? ■ Who are the clients? ■ What is the problem or what information is needed? ■ What decisions or actions will be taken? ■ When are the results needed? ■ Who are the stakeholders, including gender machineries in the country - and what are their views and priorities?
2. What type of monitoring or evaluation study is required?	■ What type of study is required (input monitoring, process monitoring, output monitoring, etc)? ■ What is the time-frame and when are the results needed? ■ Can the study be conducted at one point in time or is it necessary to collect information at different points in time? ■ Exactly what information is needed and how will it be used (collecting information to understand a problem, feedback on problems, evaluating the impact of a project, assessing the accessibility to different population groups)? ■ Is gender equality covered in the project or programme objectives and indicators or are additional research questions needed to cover gender equality?
3. Designing the study	■ Define the groups to be studied and select a sample which will covers all of the different population groups (disaggregated according to sex, age, ethnicity etc.) ■ List of information to be collected ■ Preferably use a multi-method approach, including qualitative and quantitative data collection methods ■ Prepare an interview guide (if required)
4. Conducting the study	■ Selection of the gender competent researchers and organisation of training (if required) ■ Conduct the data collection, including quality checks
5. Data analysis, report preparation and dissemination	■ Conduct the gender-responsive data analysis ■ Include consistency check to assess the validity of the information ■ Prepare a draft report

6. How to ensure the study will be used?	▪ Discuss the draft report with stakeholders and obtain feedback ▪ Include gender-balanced consultations with the community, if necessary ▪ Develop a dissemination strategy to ensure the report will reach and will be understood by all stakeholders and possibly the general public ▪ Combine written reports with workshops or briefings

Adapted from: The World Bank and Economic Commission for Africa (2001): A Gender Responsive Monitoring and Evaluation System for Rural Travel and Transport Programmes in Africa. Addis Ababa.

Tool 5.2.: Gender-relevant elements of ToR for evaluations

- Analyse the relevant documents of the programme, government policy papers, ongoing donor activities in the country and activities that are in preparation
- Analyse the political context and trends in the corresponding field and on gender equality in the field
- Assess the advancement of the ongoing phase, including on gender equality objectives based on the gender-sensitive situational analysis (baseline study)
- Disaggregate all data, tables, etc. According to sex and specify other relevant factors such as age, ethnicity or socio-economic strata
- Identify lessons learned and promising practices to be documented and disseminated
- Include gender in the mission report either mainstreamed in the text or as a separate section

Tools 6: Learning and innovation

Tool 6.1.: Checklist for gender mainstreaming in communication and public relations

The following checklist supports the reflection of the gender dimension in communication and public relations.

Area	Guiding questions
Key messages	▪ Which is the key message? ▪ Which gender implications does the key message have?
Target group	▪ Who is the target group? ▪ What do we have to consider in order to reach women and men of the target group?
Products	▪ Do all members of the target group have access to the product (e.g. print media, campaign materials, internet, e-media, and movies)? ▪ Is the product used by women and men differently?
Content	▪ Is the topic equally relevant to women and men of the target group? ▪ Does the content reflect the different perspectives of diverse women and men? ▪ Does the content avoid (discriminatory) gender stereotypes (including in photos and illustrations)? ▪ Did we consider the gender-transformative potential of the content (e.g. photos of men carrying babies, introduction of female business leaders, descriptions of non-stereotypical professional settings etc.). ▪ Is all data sex-disaggregated, if feasible? ▪ Is the language used gender-sensitive?

Adapted from: Heinrich-Böll-Stiftung (year unkown): Gender-Mainstreaming-Praxis. Arbeitshilfen zur Anwendung der Analysekategorie «Gender» in Gender-Mainstreaming-Prozessen. Berlin.

Tool 6.2.: Checklist for the integration of a gender approach into success stories and promising practices

The following checklist can help to integrate a gender perspective into the development of success stories and promising practices to share lessons learned.

Planning and Participation

- Who is affected by the problem indicated? How?
- Who participated in the planning process or during consultations? How?
- Did the planning of the measure reflect the needs and interest of men and women, different interest groups, conflict parties, ethnic or religious groups or minorities?
- How were the practical needs and strategic interests of different population groups incorporated in planning?

Strategy and Implementation

- How were the practical needs and strategic interests of different population groups incorporated in implementation?
- How do the measures implemented reflect the practical needs and strategic interests of different population groups?
- Was there an effort to address gender specific needs in this measure? If so, what was done and how did it address the gender specific needs?
- Do the examples given reflect different sectors, which might be traditionally more male or female domains (e.g. health and fishery) or different roles in the corresponding sector (e.g. fishermen and their wives)?
- Are there examples of non-stereotypical gender roles, which can be described in order to show the gender-transformative potential of measures implemented (e.g. male engagement against trafficking, female fisher…)?
- Was our activity/topic embedded in the gender and strategies of partners and other donors?

Monitoring, Evaluation, Learning and Knowledge Management

- How were the practical needs and strategic interests of different population groups incorporated in monitoring and evaluation?
- How did we measure our gender related success?
- How did we integrate the monitoring of possible unintended negative gender related impacts?
- What are gender related key massages and learning processes of the measure?

Adapted from: GIZ Decentralization Programme Philippines (2010): Checklist for the Development of Success Stories. Manila.