Gender mainstreaming toolkit for civil society organisations in Zambia

VOLUME 2

Gender mainstreaming in projects, programmes and policy engagement work
The Zambian Governance Foundation, set up in July 2009, offers capacity development and funding in support of civil society development in Zambia. ZGF provides assistance to a wide range of Zambian civil society organisations from well-established to small and emerging based in both rural and urban Zambia. It is currently supported by DFID, SIDA, DANIDA, Irish Aid and GTZ.
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1. Introduction
Aims of the toolkit

This gender mainstreaming toolkit was developed in response to a capacity gap identified among civil society organisations (CSOs) wanting to partner with the Zambian Governance Foundation. To avoid reinventing the wheel, materials have been adapted from other gender mainstreaming toolkits (see bibliography).

The toolkit has been developed in two volumes: Volume 1 contains concepts and tools designed to help civil society organisations promote gender equality within the workplace; Volume 2 contains concepts and tools to help organisations mainstream gender into their projects and programmes.

The objectives of this toolkit are twofold:

1. To help CSOs understand the importance of gender mainstreaming in their programmes and projects and in their policy engagement work;
2. To provide CSOs with tools to help them start gender mainstreaming in their programmes and projects.

Using the toolkit

The toolkit is designed to be used by the managers and staff of any CSO – both well-established ones and those still in their infancy. The area of work the CSO is involved in (e.g. capacity building, service delivery or advocacy) does not matter as the tools make it possible for any CSO to reflect on their work and ensure they are promoting gender equality through gender mainstreaming.

The toolkit is not exhaustive and it is recommended that users also reflect on other documentation that has been produced to help them on their path of gender mainstreaming in their work and in promoting gender equality as a whole.

Contents of the toolkit

The first part of the toolkit provides an introduction and background to gender mainstreaming and assesses the state of gender equality in Zambia. Part 2 concerns gender mainstreaming in projects and programmes, especially how gender concerns can be integrated into different stages in the project cycle. Part 3 describes gender mainstreaming in policy engagement activities, and includes a number of topics that deal with how organisations can engender their policy engagement work. Users are advised to read not just the tools but to also refer to the cross-referenced checklists, factsheets and sample documents in parts 4, 5 and 6 of the toolkit.

The Zambian Governance Foundation’s commitment to promoting gender equality

The Foundation recognises the importance of actively promoting gender equality with a view of achieving pro-poor and sustainable development. It supports efforts by civil society to address existing gender inequalities in different sectors and the mainstreaming of gender issues into programme strategies and activities.

The Foundation monitors the commitment of grant partners to gender during implementation, with a focus on learning and lesson-sharing.
What is gender mainstreaming?

At the Fourth UN International Conference on Women in Beijing in 1995, gender mainstreaming was established as the internationally agreed strategy for governments and development organisations to promote gender equality. This was a response to at least twenty years of experience of addressing women’s needs in development work. The UN Economic and Social Council (ECOSOC) defined gender mainstreaming as:

The process of assessing the implications for women and men of any planned action, including legislation, policies or programmes in any area and at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men can benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality. (ECOSOC, 1997)

The benefits of gender mainstreaming

Mainstreaming gender within a project means that the project will give equal opportunities to both men and women as participants and beneficiaries. Mainstreaming ensures that the needs of both men and women are accommodated and this includes women’s productive capacity to alleviate poverty and maximise economic input. Some advantages include the following:

1. Mainstreaming helps promote gender equality, which has a positive impact on economic development and poverty reduction because women tend to invest more into their families’ welfare than men;
2. Women become highly motivated as their situation improves once gender mainstreaming is applied. From this follows a positive impact on the development of society;
3. The possibility that women can take full advantage of the resources and other benefits that projects bring to communities is increased;
4. Women’s opportunities to access and influence decision-makers are increased;
5. There will be an opportunity for men to work with – and share responsibilities with – women in the context of projects (ILO, 2007c).
In order to be truly democratic, CSOs should be capable of representing the needs and interests of both their male and female members. A concern for gender equality is part of a broader social agenda, not just the responsibility of women’s organisations. Given the links between gender equality and national development, an organisation can raise its credibility and profile by working on this issue. It will also be fulfilling its responsibility to promote human rights in development, giving equal recognition to the value of men and women.

**Gender mainstreaming and your organisation**

All of your actions, whether in project development, implementation or administration, will fall into one of the following categories:

<table>
<thead>
<tr>
<th>Category</th>
<th>Actions</th>
</tr>
</thead>
</table>
| **Gender positive** | • Improved gender equality indicators  
• Maintaining a positive gender equality situation  
• Supporting gender mainstreaming capacity building  
• Enhancing visibility and awareness of gender-related issues |
| **Gender negative** | • Contributing to a worsening of gender equality indicators  
• Doing nothing to improve a negative gender equality situation, even though it was within the scope of your actions |
| **Gender neutral** | • Your action does not have a gender equality dimension |
| **Unknown** | • Lack of information means that impact is unknown |

As an organisation, your goal is to move an increasingly larger proportion of your work into the *gender positive* category and to move activities out of the *gender negative* category. Actions fall into the *unknown* category when you do not have the information needed to determine whether your actions have a positive or negative impact. Therefore, successful gender mainstreaming requires:

1. Collecting baseline data on the gender-related situation  
2. Asking “what can I do to improve the situation?”  
3. Tracking progress by monitoring key indicators
Gender equality and Zambia

This section reviews the state of gender equality in Zambia in a selection of key areas.

Legal rights

Before independence in 1964, Zambia had two distinct legal systems, one applying only to Africans and the other to Africans and Europeans. Zambian law now integrates the two legal systems: customary law, based on pre-colonial legal systems as interpreted by the colonial ‘native courts’, known as local courts today; and statutory law, much of it inherited from the pre-independence era, but modified and extended by legislation adopted since. In general, customary law grants significantly fewer rights to women and girls than statutory law.

There are cases when the two law systems do conflict. For example, under the Marriage Act, the legal age of marriage is 16, and anyone under 21 who is not a widow or widower needs written consent from the father (or mother or guardian, if the father is dead or of unsound mind). If the father refuses consent, the child can apply to a High Court judge for consent. In addition, the penal code makes sex with a girl under sixteen a crime punishable by up to life in prison. However, the Marriage Act does not apply to marriages under customary law, where the legal age of marriage is considered to be maturity. Maturity is not defined and there is no minimum age set: in some cases, maturity can mean 13 years old or the onset of menses. In practice, especially in the rural areas, it is commonplace for girls to be married or expected to have sexual relations under the age of sixteen, and prosecutions are virtually unheard of.

Property and land

In rural areas, married women have access to land for farming through their husbands, but in the event of a divorce or widowhood, they may continue to use the land but will not inherit control of the land. Most women go back to their villages where they are dependent on a male kin for access to land. It is unheard of for a married woman to be given land in her own right.
**Education**

Female illiteracy is generally high in Zambia, where the overall adult literacy rate was 68% in 2008. The ratio of literate females to males was 78% in 2007 (UNICEF, 2009). High female illiteracy is related to the negative attitudes to girl child education. Parents attach greater importance to the education of boys and see education of girls as only good for marriage and not for employment. As the table shows, net enrolment has increased, but the completion rate has not increased enough (MoE, 2008).

<table>
<thead>
<tr>
<th></th>
<th>2003</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net enrolment for girls at basic level</td>
<td>77.2</td>
<td>99.9</td>
<td>105.2</td>
</tr>
<tr>
<td>Completion rate</td>
<td>34.8</td>
<td>43.32</td>
<td>51.22</td>
</tr>
<tr>
<td>Gross enrolment rate for high school</td>
<td>12.1</td>
<td>24.7</td>
<td>25.7</td>
</tr>
<tr>
<td>Completion rate</td>
<td>13.0</td>
<td>17.22</td>
<td>18.93</td>
</tr>
</tbody>
</table>

**Participation and decision-making**

Even after four decades of independence, Zambian women are still not represented in decision-making positions at all levels. Gender inequalities are structurally embedded and persist throughout the private and public realms.

<table>
<thead>
<tr>
<th></th>
<th>1999</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cabinet level</td>
<td>4.2 %</td>
<td>25 %</td>
</tr>
<tr>
<td>Deputy Minister level</td>
<td>7.3 %</td>
<td>9.8 %</td>
</tr>
<tr>
<td>Parliamentary level</td>
<td>10.1 %</td>
<td>12 %</td>
</tr>
</tbody>
</table>

Female representation at senior executive positions at both national and local levels remains dismally low. In the 2006 elections, only 22 women were elected as Members of Parliament (14 per cent). The table shows the proportion of women at Cabinet, Deputy Minister and parliamentary levels in 1999 and 2006 (CEDAW, 2010).

**Ratification of international human rights instruments**

The Zambian government has undertaken to improve the status of women by ratifying and acceding to a number of international human rights and women’s rights instruments at the global and regional levels, including the:

- Universal Declaration of Human Rights
- African Charter on Human and People’s Rights
- International Covenant on Social, Economic and Cultural Rights
- Convention on the Elimination of all Forms of Discrimination Against Women
- Convention on the Rights of the Child
- SADC Declaration on Gender and Development
- SADC Addendum on the Prevention and Eradication of Violence Against Women and Children

Zambia has since 1984 also been party to the International Covenant on Civil and Political Rights. However, it is not enforceable before domestic courts of law in Zambia because Zambia’s dualist legal system means that the international treaties that it ratifies do not apply automatically as part of national law unless domesticated or internalised by an Act of Parliament. Nevertheless, Part III of the Zambian Constitution provides for the protection of most of the rights contained in the covenant.
## Laws and policies

Gender equality has been pursued in a number of laws and policies, especially in the period 2000-06. The following table outlines some of these.

<table>
<thead>
<tr>
<th>Policy/legislation</th>
<th>How the legislation/policy is helping protect women’s rights in Zambia</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Gender Policy (2000)</td>
<td>Emphasises the importance of equitable gender representation at all levels of decision making especially through affirmative action.</td>
</tr>
<tr>
<td>National Cultural Policy (2003)</td>
<td>Encourages positive cultural practices which do not discriminate against women. Aims to socialise boys and girls as equals in the family and community.</td>
</tr>
<tr>
<td>The Education Policy (1996)</td>
<td>Facilitates equitable access to education at all levels by all regardless of sex.</td>
</tr>
<tr>
<td>The Health Policy (1992)</td>
<td>Includes specific goals such as a reduction in maternal mortality rates and improving reproductive health of women as a whole.</td>
</tr>
<tr>
<td>Penal Code (Amendment) Act No. 5 of 2005</td>
<td>Criminalises acts such as rape, abduction, indecent assault, defilement of girls under 16 years of age, prostitution, sexual trafficking, brothel keeping and others.</td>
</tr>
<tr>
<td>The Constitution (Article 11 and 23)</td>
<td>Proscribes discrimination, including discrimination based on sex or marital status.</td>
</tr>
<tr>
<td>Intestate Succession Act, Chapter 59</td>
<td>Safeguards inheritance rights of women whether married under statutory or customary law. Regulates the distribution of property to beneficiaries where a person dies intestate.</td>
</tr>
<tr>
<td>The Wills and Administration of Testate Estates Act, Chapter 60.</td>
<td>Safeguards women’s inheritance rights. Regulates the administration of wills and their enforcement.</td>
</tr>
<tr>
<td>The Affiliation and Maintenance of Children’s Act, Chapter 64</td>
<td>Empowers women in sections 3, 4 and 5 to apply for affiliation and maintenance orders.</td>
</tr>
<tr>
<td>The Zambia Police Act (Amendment) No 14 of 1999</td>
<td>Established the Police Public Complaints Authority which provides an avenue for all individuals including women and children to report any abuse of authority by police officers for redress.</td>
</tr>
<tr>
<td>Employment Act, Chapter 268</td>
<td>Guarantees rights to employment.</td>
</tr>
<tr>
<td>The Lands Act, Chapter 184</td>
<td>Proposed within the revised draft is that 30% of titled land should be reserved for women, including those in rural areas.</td>
</tr>
<tr>
<td>Industrial and Labour Relations Act, Chapter 269</td>
<td>Guarantees rights to employment. Prohibits any form of discrimination in employment on the grounds of sex, race, marital status, religion, political affiliation or tribal extraction.</td>
</tr>
<tr>
<td>The Citizens Economic and Empowerment Act No. 9 of 2006</td>
<td>Prohibits discrimination on grounds of gender and facilitates the establishment of the Economic Empowerment Commission whose function is to provide gender equality in accessing, owning, controlling, managing and exploiting economic resources.</td>
</tr>
<tr>
<td>The Zambia Development Agency Act No. 11 of 2006</td>
<td>Mandates the Zambia Development Agency to recommend to the minister responsible for trade strategies which promote gender equality in accessing, owning, controlling, managing and exploiting economic resources. Supports the creation of micro and small-scale business enterprises and promotes their participation in trade and industry.</td>
</tr>
<tr>
<td>National AIDS Council Act 2002</td>
<td>Responds to issues of HIV and AIDS.</td>
</tr>
<tr>
<td>Local Courts and Subordinate Courts Acts</td>
<td>Prohibits the application of repugnant customary laws.</td>
</tr>
</tbody>
</table>
2. Mainstreaming gender into projects and programmes
Good practice in gender mainstreaming

An ILO study of good practice found that gender mainstreaming has to be: (1) strategic; (2) practical; (3) specific; (4) systematic; and (5) measureable (ILO, 2007c). Several other criteria can be added to this list, such that gender mainstreaming into projects and programmes should be:

**Strategic**: at the design stage of the project, the organisation has to ensure that the overall strategies and objectives are all gender sensitive.

**Practical**: having identified the overall goal and objectives, concrete outputs and activities have to be identified through which the set objectives can be realised.

**Specific**: the organisation needs to move from giving blanket statements such as ‘gender issues will be mainstreamed into all aspects of the project’, to actually outlining in detail how this is to be done.

**Systematic**: if an organisation decides to promote gender equality, then it must ensure that gender is integrated into all stages of the project cycle from design and implementation through to monitoring and evaluation. This means that gender cannot be a stand-alone component but has to be seen throughout the project.

**Measureable**: in order to ensure that gender is not ‘mainstreamed away’, indicators and mechanisms are needed to monitor and evaluate the project’s progress and achievements in promoting gender equality.

**Supported**: (1) senior managers within the organisation have to support the process and be ready to deal with any challenges and resistance during implementation. Not only does the leadership have to have will and commitment, it has to be open to innovation and, importantly, willing to allocate resources and expect results. (2) Additional external expertise in the gender field should be drawn upon, particularly where the organisation does not have expertise available internally.

**Innovative**: the mainstreaming process has to be flexible enough to incorporate new ideas, particularly from the target groups. Zambia has nine provinces, each different from the others, so any mainstreaming strategies should allow for the uniqueness of each of them.

**Budgeted for**: engendered budgets are critical to transforming rhetoric about gender equality into concrete reality. Gender budgeting gives a concrete dimension to the gender implications of your project. It will ensure that you have allocated resources in a way that will allow the project team to address both men’s and women’s needs.
Gender concerns in the project cycle

The criteria for successful gender mainstreaming apply during each and every phase in the project cycle. The ILO has identified the nine elements listed below as the building blocks of gender mainstreaming strategies that have proved successful in making projects more responsive to gender equality. It is worth noting that these steps do not represent an exhaustive list, and neither do they automatically guarantee gender equality in project outcomes, but they do promote greater gender sensitivity in the various project phases.

1. Gender analysis
2. Gender needs assessment
3. Gender planning
4. Gender-specific action
5. Capacity building on gender equality
6. Gender-sensitive monitoring and evaluation
7. Knowledge sharing on gender mainstreaming
8. Relevant gender expertise
9. Adequate resources (ILO, 2007c)

The next few sections of the toolkit describe each of the stages in the project cycle and detail what gender concerns might arise and how best they might be dealt with.
1. Gender analysis

Gender analysis is a systematic attempt to identify key issues contributing to gender inequalities so that they can be properly addressed. It is described in one gender mainstreaming toolkit as:

‘...the study of differences in the conditions, needs, participation rates, access to resources and development, control of assets, decision-making powers etc., between women and men in their assigned gender roles. Gender analysis is also necessary to determine whether specific actions are needed for women or men, in addition to mainstreaming activities.’ (EC, 2004)

Although gender analysis can be undertaken at any stage during the project cycle, it is most effective at the initial planning and design stages so that it can inform the subsequent steps, including implementation, monitoring and evaluation. Above all, gender analysis is a tool for identifying the different roles and needs of women and men in a given context and project setting. It is concerned with:

- Collecting data broken down by sex;
- Identifying the division of labour between men and women;
- Understanding girls’, boys’, women’s and men’s needs, constraints and opportunities;
- The sex-based division of access to, and control over, resources and benefits;
- Opportunities and constraints in the social and economic environment;
- Reviewing organisations’ capacities to promote gender equality (ILO, 2007a).

‘A lack of capacity to conduct gender analysis often results in gender blind policies that do not impact women and men in the same way.’

ILO 2009

Gender analysis contributes greatly to identifying and understanding a project’s stakeholders. It assesses their interests and the ways in which they affect the project’s viability, thus helping to identify appropriate forms of stakeholder participation.

(See also: factsheet 5, sample documents 1 & 2)

2. Gender needs assessment

Gender needs assessment is closely linked to the concept of gender analysis. In doing gender analysis, planners obtain information about the gender needs of men and women in the given community. They then determine whether these needs are practical or strategic in nature.

Practical gender needs are needs that, once met, would enable women and men to maintain their existing positions in society. However, strategic gender needs, once met, would transform these positions and subsequently alter power relations between women and men. Gender analysis and needs assessment are valuable analytical tools for strengthening a project’s potential to meet the different interests of women and men throughout the project cycle with the aim of promoting fundamental rights at work and equal access to decent employment.
### Practical gender needs (PGNs)

The needs women identify in their socially accepted roles in society. PGNs arise out of and do not challenge gender divisions of labour and women’s subordinate position in society. PGNs are a response to immediate and perceived necessity, identified within a specific context. They are practical in nature and often concern inadequacies in living conditions such as water provision, health care and employment.

### Strategic gender needs (SGNs)

The needs women identify because of their subordinate position in society. They vary according to particular contexts, related to gender divisions of labour, power and control, and may include issues such as legal rights, domestic violence, equal wages and women’s control over their bodies. Meeting SGNs assists women to achieve greater equality and to change existing roles, thereby challenging women’s subordinate position. They are more long-term and less visible than PGNs (Moser, 1993).

A useful tool for identifying gender-based patterns is a *needs profile*, such as this one:

<table>
<thead>
<tr>
<th>Identified needs (in order of priority)</th>
<th>Women’s needs</th>
<th>Practical needs</th>
<th>Strategic needs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<td></td>
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</tbody>
</table>

*(See also: sample document 1)*

### 3. Gender planning in project planning

Having decided to promote gender equality as one of your goals, it is important that you plan for it. Planning is one of the most important project management techniques; it involves the development of items for action and schedules that will keep the project moving forward on a consistent basis. Planning is preparing a sequence of action steps to achieve some specific goal. It focuses on identifying and arranging the individual tasks required to complete each step in the project using the resources identified. If done effectively, it can reduce the time and effort of achieving the goal.

A plan is like a map. When following a plan, you can always see how much you have progressed toward your project goal and how far you are from your destination. Knowing where you are is essential for making good decisions on where to go or what to do next. Another reason why you need planning is expressed in the ‘80/20 rule’—which says that in unstructured activities 80 per cent of the effort gives less than 20 per cent of
the valuable outcome (because too much time is spent on deciding what to do next, and many unnecessary, unfocused, and inefficient steps are taken).

Gender planning consists of developing a strategy which describes how gender equality will be promoted in project activities through specific measures and organisational arrangements such as commitments to balanced representation of women and men in project activities and ensuring that adequate resources and expertise are available.

If women are the poorest members of society, the most subordinate, and are consistently denied access to rights, services and benefits, then it is logical to assume that planning needs to be informed by a gender analysis which seeks to address the root causes of these gender-based inequalities. As such, the findings of the gender analysis and needs assessment should be used to inform strategic planning of any project intervention.

Gender planning entails formulating gender-sensitive strategies and objectives (as well as corresponding gender-specific indicators), gender-sensitive outputs and activities and gender-sensitive budgets.

Ultimately, when someone picks up any project document, such as a logical framework, workplan, monitoring and evaluation framework or budget, they should be able to see how the findings from the gender analysis have been applied in its development.

(See also: checklist 1)

4. Gender-specific action

Affirmative action (also termed positive measures) to counter sex discrimination comprises special, usually temporary measures to redress the effects of past or continuing discrimination in order to establish de facto equality of opportunity and treatment between men and women. Such measures are targeted at a particular group and are intended to eliminate and prevent discrimination and to offset disadvantages arising from existing attitudes, behaviour and structures based on stereotypes concerning the division of social roles between men and women (ILO, 2007b).

Action to redress gender inequalities can be proposed in a project’s gender planning stage. Action can be directed either at women and/or men to ensure that the project affords and promotes equal opportunities and treatment through its activities.

Gender-specific action can include one or a combination of the following:

1. Positive or affirmative action;
2. Women-specific activities;
3. Men-specific activities.

Examples in Zambia of affirmative action targeting women and men include the introduction of a lower cut-off point for girls at grade seven and nine, and the deliberate apportionment of land to women by the local councils.

People who oppose specific actions for women often maintain that it is demeaning to give them special treatment and that it is even contrary to human rights. However, specific actions aim to create a critical mass of the disadvantaged group whereby their voice can be heard.

A goal without a plan is just a wish!
Antoine de Saint-Exupery
(French writer, 1900-44)
5. Capacity building on gender equality

As an organisational strategy to promote gender equality, gender mainstreaming depends on the skills, knowledge and commitment of the staff involved in management and implementation. ‘Evaporation’ of policy commitments to gender equality is common. Developing appropriate understanding, commitment and capacity, as well as addressing issues of gender inequality within organisations, is a long-term process of organisational change. Appropriate capacity-building activities need to be explicit in policy and project documents and frameworks, backed up with staff and budgets, and monitored and reviewed through appropriate indicators of change.

Capacity building is a commonly-used term that holds many different meanings for different people. For many, capacity building is equated to training, and in this sense to just one or several classroom setup training events. Within the context of this toolkit, capacity building is defined as a process whereby people are enabled to better perform defined functions either as individuals (through improved technical skills and/or professional understanding) or as groups (aligning their activities to achieve a common purpose). In this sense, it is not a single event but a continuous process that leads to enhanced performance.

Capacity building entails much more than training and includes human resource development – equipping individuals with the understanding, skills and access to information, knowledge and training to enable them to perform effectively. This is a continuous process that should happen throughout the project cycle.
Organisations therefore have to take time to select the best approaches and methods to build the capacity of the staff in gender. This can include:

1. Training;
2. Providing access to information and resources – for example, letting staff know about relevant websites or indeed setting up a website, ensuring the organisation is a member of organisations like the Zambia Association for Research and Development, and ensuring there is a budget line for purchasing the latest national statistics from the Central Statistical Office;
3. Publications – producing fact sheets on gender, brochures, articles in newsletters;
4. Consultation – for example, coaching, facilitating, expert advice and periodically conducting research specifically on gender issues;
5. Coordinating alliances – allowing for the formation of internal and external, formal and informal networks.

Choosing which approach to use will depend to a large extent on the resources available, but a good mix of approaches will ensure that all staff are reached.

Capacity building and awareness raising on gender equality and gender mainstreaming for both project staff and beneficiaries are essential in ensuring that gender analyses and planning are applied throughout the project cycle and used to inform project activities. Capacity building should focus on clarifying key gender concepts, understanding the role of gender analysis and providing practical guidance on how to undertake gender planning for project and programme activities. Any capacity building activities undertaken should be monitored for relevance, impact and effectiveness.

In the initial stages of the mainstreaming process, it is always useful to have a gender focal point person within the organisation. This person can work full-time in this role resources allowing; but otherwise another member of staff can take up this role.

*(See also: checklists 3 & 4)*

6. Gender-sensitive monitoring and evaluation

Accountability is vital – in this case it means determining whether or not mainstreaming has happened. It is only by examining outcomes and results and assessing them relative to expectations (and/or baseline conditions) that it will be possible to determine the extent to which gender and development goals have been met. This requires a monitoring and evaluation system, preferably one set up right at the start of a project. It also requires adopting indicators – and both process and outcome indicators are necessary:
- Process indicators can help in determining whether or not project implementation is on track and in diagnosing problems and fixing them. They are also important for assessing the extent of community and women’s participation on the project;
- Outcome indicators are needed for assessing results – whether or not project goals were met and the extent to which the economic and social conditions and the well-being of target populations improved (Mehra and Gupta, 2006).

Most important, if intended goals and improvements did not occur, or were partially achieved, accountability would require determining the causes, learning from them and fixing them.

**Setting the indicators**

Gender indicators can be *quantitative*, denoting numbers of women and men, or *qualitative*, referring to perceptions and experiences. Qualitative information is vitally important. It is not enough to know that women are participating in an activity: the quality of their participation and experience matters.

Indicators should be developed in conjunction with beneficiary groups. In a project document it is quite legitimate to state that ‘quantitative and qualitative indicators are to be developed with beneficiary groups in the first six months of the project’. This creates the space to develop indicators in conjunction with beneficiary groups once they have fully understood the nature of the project. (What changes would they like to see? What will the change look like? How can it be measured?) This process should take place using qualitative methods such as focus group discussions and informal interviews (Derbyshire, 2002, p.29).

It is only possible to set targets for qualitative change if baseline data is available. This requires baseline surveys: it is highly unlikely that appropriate baseline data will be available from secondary sources. Where baseline data is available on experiences and perceptions, targets for qualitative change can be set.

Monitoring and evaluation are important tools in assessing whether projects are meeting planned targets and objectives. They are also valuable processes for reviewing the extent to which projects are addressing key gender issues, including progress towards achieving equal access to education, training and decent employment. In order for monitoring and evaluation to be gender-sensitive, however, it is crucial that the relevant gender-sensitive indicators be integrated into the project design and that they in turn are integrated into the monitoring and evaluation guidelines and terms of reference. The gender analysis and planning processes described above are key stages in developing such indicators.

*(See also checklist 1)*

### 7. Knowledge sharing on gender mainstreaming

Knowledge sharing plays a key role in developing gender mainstreaming strategies. In essence, knowledge sharing is a process that captures and organises knowledge and experience and makes it accessible to a wider audience, thereby cultivating new linkages between interested groups.

A knowledge-sharing strategy is built on the same principles which underlie a communication strategy, being built upon the answers to the basic questions of who needs what information, from whom, through what media and materials and in what sequence? The emphasis in a knowledge-sharing strategy, as in a communication strategy, is on two-way communication, which is to say real sharing as opposed to dissemination or distribution. This can, among other things, result in the optimal use of knowledge being generated within the system.
‘Good practices’ and ‘lessons learnt’ are valuable sources of knowledge as they enable people to learn from the experiences of others and apply them in their own work.

There are various initiatives that an organisation can implement in knowledge sharing:

1. Sharing between projects. This is particularly relevant for organisations that have more than one project running at a time;
2. Forming a network of gender focal point persons or staff from different organisations. Between them, they can then network and present and adapt lessons on gender mainstreaming. This provides an effective avenue for sharing relevant tools on gender mainstreaming developed by the different members;
3. Through newsletters which can be circulated to other stakeholders;
4. Through publications, which will have a deliberate focus on sharing information on the gender mainstreaming;
5. Thematic events that cover an aspect of gender mainstreaming;
6. Training activities;
7. Internet-based knowledge sharing.

It is important to remember that the basis of any knowledge sharing is data – collected systematically throughout the project. This has to be planned for from the beginning of the project and resources put aside to ensure it is done. Aside from statistical information, interesting and valuable data can take the form of case studies, success stories and quotable quotes and all ought to be shared to enhance learning.

8. Relevant gender expertise

As an organisation, it is hardly possible to have all the expertise required to support the gender mainstreaming process. It is therefore necessary to build a database of different gender experts – individuals and CSOs – working around gender equality. This database will also help in making decisions regarding the types of linkages to be made with different identified institutions, e.g. will you initiate new networks/coalitions or join existing networks of CSOs working on gender issues to ensure you can tap into available resources?

When do you need to get external gender expertise?

1. When you do not have the expertise to promote the gender mainstreaming process internally;
2. When you do not have the relevant knowledge and skills to promote gender equality at the community level (for example, you could engage experts to facilitate participatory processes in the community to ensure equal participation by both genders);
3. When conducting gender analytical research/studies, which requires specialised skills.

The following Zambian or African organisations/institutions are a good starting point when building a gender database (also see factsheet 10 below):

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Effective gender mainstreaming requires continuous learning:

- Broadening the debate around gender and gender mainstreaming;
- Promoting richer content of debate by facilitating a wide range of resources and much improved flow of information, experiences and perspectives on existing policies and programmes
- Systematically capturing, learning from and sharing (our own and others) good practices in gender mainstreaming

(UNDP, 2000)
1. The Gender in Development Division (GIDD) within the Cabinet Office
2. The Zambia Association for Research and Development (ZARD)
3. The Non Governmental Organisation Coordinating Council (NGOCC) – an umbrella body
4. The Young Women’s Christian Association (YWCA)
5. Women for Change (WfC)
6. Women and Law in Southern Africa (WLSA)
7. Women in Law and Development in Africa (WILDAF)

9. Adequate resources

Gender mainstreaming requires financial resources to succeed. It need not necessarily be expensive, but managers need to recognise the need to have funds available to support the process.

*Gender Sensitive Budgeting* is budgeting that integrates a gender perspective and tracks how budgets respond to gender equality commitments and targets. It is designed to mainstream the gender dimension into all stages of the budget cycle. It refers to the process of conceiving, planning, approving, executing, monitoring, analysing and auditing budgets in a gender-sensitive way. It involves analysis of actual expenditure on women and girls as compared to on men and boys taking into account their different needs and priorities. It helps to decide how strategies should be made, adjusted and priorities reviewed (IOM, 2008, p.6)

Although budgets are usually perceived as gender-neutral or a set of numbers that impartially affect women and men, closer inspection reveals that this is often not the case. The way project funds are spent has a different impact on women and girls as compared to men and boys, often to the detriment of the former.

Gender sensitive budgeting is not an end in itself but an integral part of gender mainstreaming. More often than not, attempts at gender-sensitive budgeting reveal the low level of funds allocated to gender mainstreaming strategies.

There are five main steps to gender budgeting:

1. Ensure that a gender analysis and needs assessment have in fact been conducted;
2. Check whether the project strategy (planned objectives, outputs and activities) is gender-sensitive, i.e. whether it addresses the situation described;
3. Check that adequate funds are allocated to implement the gender-sensitive strategy (for example, adequate funds to allow a set number of women to come to the training with their small children and a child minder);
4. Check whether the expenditure is spent as planned;
5. Examine the impact of your project, i.e. whether it has addressed both men and women’s needs.

Ultimately, you should be focused on getting the most out of any money that you spend – value for money! If you had planned to promote gender equality through gender mainstreaming then conducting an impact assessment should be of interest even to finance officers.
3. Gender mainstreaming and policy engagement
Governance, gender and policy engagement

Good governance is the transparent and accountable management of human, natural, economic and financial resources for the purposes of equitable and sustainable development, in the context of a political and institutional environment that upholds human rights, democratic principles and the rule of law (Cotonou Agreement, 2002). It requires governments to govern in accordance with the will, interests and rights of the people, and there is growing recognition that this in turn means engaging citizens in discussions about policy-making. Citizens (men and women, boys and girls) are keen to ensure that their voices are heard in the formulation of public policy, and CSOs can play a key role in this by strengthening their capacity for policy engagement. Gender mainstreaming in programmes helps ensure that both sexes have their voices heard.

Policy definitions

Effective policy engagement requires an understanding of some fundamental terms: policy, public policy and the policy cycle.

Policy

A policy can be considered to be a set of choices or preferences. It refers to, among other things, guidance for action. A policy may be general or specific, broad or narrow, complex of simple, public or private, written or unwritten, discretionary or detailed, qualitative or quantitative (Sapru, 2004).
Public policy

Public policy is an attempt by the government to address a public issue. The government develops public policy in terms of laws, regulations, decisions, and actions. In a nutshell, public policy seeks to achieve a desired goal that is considered to be in the best interest of all members of society. Examples include clean air, clean water, good health, high employment, an innovative economy, active trade, high educational attainment, decent and affordable housing, minimal levels of poverty, improved literacy, low crime and a socially cohesive society, to name a few (Torjman, 2005).

<table>
<thead>
<tr>
<th>Form of policy</th>
<th>Format</th>
<th>Example in Zambia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legislation</td>
<td>Written</td>
<td>The NGO Act</td>
</tr>
<tr>
<td>Policy documents</td>
<td>Written</td>
<td>The Gender Policy</td>
</tr>
<tr>
<td>Programmes</td>
<td>Written, can be discretionary or detailed</td>
<td>The Ministry of Agriculture Farmer Input Support programme</td>
</tr>
<tr>
<td>Practices</td>
<td>Unwritten and not as a result of law or a policy document</td>
<td>Practices within the jails of Zambia, e.g. convicted criminals kept together with prisoners on remand</td>
</tr>
<tr>
<td>Administrative procedures</td>
<td>Written – can be general or specific</td>
<td>Administrative procedures related to access to Constituency Development Fund</td>
</tr>
</tbody>
</table>

The policy process

The policy process is said to be made up of five distinct stages:

1. *Agenda setting, problem definition and articulation:* this involves recognising a problem or gap with a policy or the need for policy change and expressing the need for state intervention. Selection of a recognised problem and putting it on the government’s (formal or informal) agenda for serious consideration of public action;
2. *Decision-making:* this includes the definition of objectives and consideration of alternatives, looking at the expected outcomes, effects and impacts of each alternative, strengths and weaknesses, worst and best case scenarios, etc. Decisions are made on what criteria is to be used to decide: e.g. cost-benefit analysis, environment impact assessment, risk analysis;
3. *Policy formulation and enactment:* proposals and demands are transformed into government policy documents, actions or programmes as well as laws and regulations;
4. *Policy implementation:* this can include the specification of programme details and the execution or enforcement of a policy by the agencies responsible;
5. *Policy evaluation:* this can involve evaluation and review of the policy in action, research evidence and views of users. Here there is a possibility to loop back to stage one.

Policy engagement

Policy engagement refers to how external actors (including CSOs) interact with decision-makers and others to try to influence policy positions, approaches and behaviours at each stage of the policy process (Court et al., 2006).

Civil society and policy engagement

Civil society organisations can play multiple roles along the policy cycle (set out in detail in the following table). In the case of Zambia, engaging in the public policy process means trying to influence government
policy positions on development, trying to influence the government’s approach to development policy-making (e.g. one that is inclusive and consultative) and trying to influence the behaviour of those that are making the decisions, e.g. getting Members of Parliament to start to visit their constituencies consistently and speak about particular issues affecting the community.

<table>
<thead>
<tr>
<th>Stage in the policy cycle</th>
<th>What is involved in the stage</th>
<th>Possible activities that can be undertaken by CSOs</th>
</tr>
</thead>
</table>
| Agenda setting            | **Problem definition and articulation**: recognising a policy problem or the need for policy change and expressing the necessity of state intervention. **Agenda setting**: selection of a recognised problem and putting it on the government’s (formal or informal) agenda for serious consideration of public action. | • Research – to identify the problem.  
• Context and stakeholder assessment – to establish institutions and other actors involved  
• Community consultative meetings – to gain the views of the community members on the issue  
• Stakeholder consultative meetings – moving beyond the community to meet other relevant people  
• Publication and dissemination of data on the identified problem (brochures, posters, billboards)  
• Building networks and coalitions with other CSOs to work together on the issue,  
• Round table meetings with key leaders in Government to alert them to the problem  
• Community sensitisations on the identified issue  
• Training of community members (including local leaders) around the given issue and particularly on how to deal with it  
• Training of staff members within the organisation to build their knowledge and skills on the issue, on the policy process, on Government procedures  
• Awareness raising on the issue targeting local leaders (councillors, district level officials) |
| Policy formulation        | Proposals and demands are transformed into government policy documents, actions or programs. This includes the definition of objectives as well as the development of legislation and regulation | • Research/analyses on issues known to be under consideration, or that they believe ought to be priorities, with the hope of influencing the policy being formulated  
• Preparation of proposals to government on alternative policies  
• Lobbying identified stakeholders to get agreement on proposed policy  
• Roundtable meetings with identified stakeholders  
• Commenting on the draft policy documents  
• Live debates/call in programmes by engaging electronic and print media in fostering live debate around the issue  
• Articles for the media on the issue  
• Advocacy targeted at the general community to build a critical mass of support among citizens  
• Network with other CSOs to advocate on identified issues  
• Participation in policy platforms (Sector Advisory Groups, District Development Coordinating Committees, etc.)  
• Produce guidelines on available platforms for enjoyment with Government and on entry points for participation for CSOs  
• Capacity building of CSOs on engaging with government |
| Decision making | Involves considering all possible alternatives and making a decision about which direction to take | • Researching policy alternatives  
• Commenting on the alternatives being discussed  
• Lobbying and advocacy on preferred options |
|-----------------|-------------------------------------------------|----------------------------------------------------------------------------------|
| Policy implementation | Can include the specification of program details and the execution or enforcement of a policy by the responsible agencies | • Producing and disseminating written information on the available policy  
• Awareness-raising among the community members on the policy being implemented and access to benefits/services if appropriate  
• Advocacy to hold government accountable for implementation  
• Piloting demonstration projects as policy experiments, thus offering an opportunity to demonstrate solutions to policy problems (e.g. CSOs engagement in provision of home based care as a way of increasing acceptability of a new approach to health services for the chronically ill)  
• Participation in implementation process, e.g. widening the reach of implementation of a given programme |
| Monitoring and evaluation | This can involve evaluation and review of the policy in action, research evidence and views of users  
At this point it is possible to revert to stage one | • Research on impact of the policy implementation  
• Building capacity of community members to conduct monitoring of the implementation of the policy  
• Tracking and monitoring the implementation of the policy  
• Providing feedback to the policy makers on the policy implementation and its outcomes and impact |

**Advocacy and policy engagement**

Possibly the most fundamental policy role played by CSOs is being an advocate on given issues on behalf of the people they represent.

Advocacy is taking action to help people say what they want, secure their rights, represent their interests and obtain the services they need. Advocacy promotes social inclusion, equality and social justice. (Action for Advocacy, 2002, p.1)

In the context of public policy, advocacy can be defined as attempting to influence public policy through education, lobbying, or political pressure.

Advocacy groups often attempt to educate the general public as well as public policy makers about problems and the legislation needed to address them. Although advocacy is not always supported, it is clear that public policy priorities are influenced by advocacy. Sound research data can be used to educate the public as well as policy makers, thereby improving the public policy process.

Advocacy is a process of supporting and enabling people to:

- Express their views and concerns;
- Access information and services;
- Defend and promote their rights and responsibilities;
- Explore options and choices.
Advocacy revolves around the belief in equal opportunities for everyone. Effective evidence-based advocacy can enable people to have their rights and interests given the same consideration as those of the rest of society. It can take several steps, as shown in the following table (PHR, undated):

<table>
<thead>
<tr>
<th>Key step</th>
<th>What is involved</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Coming together</td>
</tr>
<tr>
<td>2</td>
<td>Setting the objectives</td>
</tr>
<tr>
<td>3</td>
<td>Getting the facts</td>
</tr>
<tr>
<td>4</td>
<td>Deciding who you are trying to influence</td>
</tr>
<tr>
<td>5</td>
<td>Determining what decision can be influenced</td>
</tr>
<tr>
<td>6</td>
<td>Building alliances and coalitions</td>
</tr>
<tr>
<td>7</td>
<td>Deciding on the method for your advocacy</td>
</tr>
<tr>
<td>8</td>
<td>Reviewing and adjust</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Method for your advocacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Writing letters, making phone calls to politicians</td>
</tr>
<tr>
<td>2</td>
<td>One on one meetings with politicians, government departments, service provider groups and influential community people and organisations</td>
</tr>
<tr>
<td>3</td>
<td>Public education: oral presentations, written articles, factsheets, reports, speaking events</td>
</tr>
</tbody>
</table>

**Engendering your policy engagement work**

Assessing implications for both women and men in all policy engagement activities helps promote government policies and programmes that are not gender blind. For each of the possible policy engagement activities, gender considerations have to be taken into account.

The following topics deal specifically with common policy engagement interventions that are undertaken across the policy processes. These include:

1. Research
2. Community mobilisation at the local level
3. Stakeholder meetings
4. Production of publications and the use of illustrations
5. Networking by CSOs
Sound policy development and advocacy relies on sound research, data and analysis. As such, collating and commissioning targeted gender analytical research is one of the critical ways of promoting gender equality as a whole.

Gender sensitive research is not research on women or on gender relationships; it is research that takes into account gender as a significant variable in development. Gender sensitive research pays attention to the similarities and the differences between men and women’s experiences and viewpoints, and gives equal value to each.

What are the benefits of engendering research?

A better understanding of the problem.
Engendering research does not change the scope of the research; it provides new perspectives, raises new questions, and uses new analysis tools to create a more complete picture of the problem. As men and women have different roles and different power, their perspectives on a problem can be quite different. By combining their different experiences and viewpoints, researchers can enhance the comprehension of a problem. Therefore, integrating a gender perspective into research can improve its relevance, coverage, and quality.

Methodologies that empower. A gender sensitive research methodology is usually more participatory and can contribute greatly to empowering people, especially women. It helps both men and women concerned by a problem to analyse an issue, understand its causes, and find solutions.

Sustainable developmental policies. Gender-sensitive research that highlights men’s and women’s perspectives, contributions, and needs can influence policymakers and contribute to more efficient and effective policies that address both men’s and women’s needs.

(See also: factsheet 6)

What you can do to ensure research is gender sensitive?

1. At the research proposal writing stage, ensure that a gender expert is available to alert the organisation on potential gender biases evident in the research proposal or which may be present in the research findings. This expert will also enhance the gender mainstreaming capacity of other members of the research panel.

2. Promote the use of multiple research methodologies as this will provide a better chance of exposing bias – including gender bias inherent in any one methodology, e.g. combine both quantitative and qualitative research methods.

3. All statistics that are collected need to be disaggregated according to gender and presented as such.

4. Any information system within the organisation should be based on sex disaggregated data.
Community mobilisation is a capacity-building process through which local individuals, groups or organisations identify needs and plan, carry out and evaluate activities on a participatory and sustained basis in order to improve their lives. Whether initiated locally or stimulated by others, it usually has to be guided by effective organisers and leaders.

Within the policy cycle, community mobilisation will take place at:

1. Agenda setting – to enable the community become aware of and discuss an issue;
2. Policy formulation – to enable the community voice their opinions on the issues being discussed and on how policy is being formulated;
3. Decision making – to enable community members influence the government’s decisions on policy direction;
4. Policy implementation – to enable them become part of a pilot project or to get them together to help build their capacity in understanding the implementation process;
5. Policy monitoring – to get them together to monitor the implementation of the policy or programme.

Given this recognition, it is critical that as an organisation men and women, boys and girls are recognised as being a part of the community and as having valuable contributions to make in the policy process.
Key observations at community level that impact negatively on women’s and men’s participation in developmental programmes include:

1. Women’s strategic and practical roles in society mean that they are not always able to attend meetings being called;

   For example, you get to a meeting and are told all the women are “kumunda” (in the garden). Or you are in the middle of a meeting and realise most of the women left the meeting because “baya mukunaya ubwali” (they have gone to prepare food).

2. Culture and tradition does not allow for the women to voice their opinions in front of men;

3. Literacy levels among women are low – in 2000 over 50 per cent of adult women in rural areas were illiterate (MoE 2008b). Written materials are often in English, or even if translated, they may not be in a language that the community members understand;

4. Community leaders are still predominantly men, so women’s voices are not heard and their interests ignored.

(See also: checklist 3)

What can you do to ensure that your approach to community mobilisation is gender sensitive?

1. Ensure that practical measures have been put in place to ensure information on the community meetings have reached both the men and women, boys and girls.

2. Prior to the meetings consult and find out when it is most appropriate to meet the community, a time convenient for both the men and the women.

3. If necessary, arrange to have the meetings wherever it is the men or women are e.g. in their field, or at a clinic etc..

4. Prior to the meeting find out the traditions and culture of the community you are going to and plan to hold open mixed sex meetings or to hold meetings where you will separate the sexes.

5. Where necessary engage the traditional leader in ensuring that both sexes participate in the community mobilisation/consultations.

6. Part of identifying leaders to champion the community mobilisation should include only where possible, the inclusion of women as leaders.
In this context, stakeholder meetings refers not to meetings among the people at community level, but to higher level meetings with district councils, ministerial departments, or other institutions and individuals that would be affected by your project. Stakeholder meetings, like community consultations and mobilisation interventions, will take place throughout the policy cycle. It has been observed during these meetings that:

1. The meeting will be male-dominated, particularly if it requires heads of departments or heads of institutions;

2. Even when women are represented during stakeholder meetings, they will rarely contribute for fear of being told “umwanakashi wulya ukulandikisha” (that women talk too much) or “echo ifyupo filepwila” (no wonder marriages are ending);

3. If the participants do group work, the chairperson is almost always male while women are relegated to the position of rapporteur. Common excuses for letting this happen are that “women are good secretaries” or “women write nicely”;

4. Any attempts to introduce an issue from a gender perspective is met with comments such as “You women will never be equal to us men” or “Yaba! Gender again. Ok, lets discuss gender in here but at home forget it!”

Move away from focusing only on ensuring that women are present at meetings to ensuring that women also participate. It is important that you plan how best to counter such situations and any resistance to promoting gender equality if the organisation is serious about gender mainstreaming.

**What can you do to ensure your meetings are gender sensitive?**

1. Ensure your invitation letter clearly outlines your desire to ensure there is a balanced gender representation;

2. Resources allowing, request that each invited organisation is represented by one male and one female representative;

3. If you still only get men represented, ensure the facilitator/chairperson is gender sensitive and consistently allows for reflection on the needs of both sexes;

4. Include gender issues in all your presentations to ensure that all present are well aware of the gender implications of what is being discussed;

5. If necessary prepare separate presentations to bring out issues affecting one sex and therefore help build participants’ knowledge on the issue;

6. During the meetings where both men and women are present, ensure that the meeting engages a methodology that allows free participation, including the use of cards to allow for anonymity;

7. Insist that during any group work, the role of chairperson and rapporteur and presenter should be interchanged between the sexes.
In planning any publications, be they brochures, posters, pamphlets and so on, that you remember that:

1. They may send negative, often unintended, messages that reinforce gender stereotypes and inequities;
2. They also may be distributed inequitably, reaching more members of one sex than the other and thus limiting access to important information;
3. They may be in a format and language that disadvantages one sex from accessing the information contained. Always remember that education, literacy, and language skills often vary by gender.

There are five steps involved in the production of publications:

1. Build organisational capacity so that staff have the awareness, skills, and supportive work environment needed to produce gender-sensitive publications;
2. Conduct a gender analysis of the audience to guide the content and distribution of each publication;
3. Produce a publication that considers gender in the choice of subject matter, language, programme examples, training exercises, illustrations, design, and layout;
4. Design a dissemination strategy that makes sure a publication will reach both men and women in the audience; and
5. Monitor and evaluate the effectiveness, impact, and benefits of the publication for women and men in the audience.
**Graphics and illustrations**

Take care in selecting graphics (photographs and illustrations) for instructional texts. Learning materials teach far more than information. The tone, content and selection of illustrations encourage attitudes about race, religion, sex, occupations, life expectations and self awareness.

Women are frequently shown in traditional and subservient roles, while men are often shown in authority positions or aggressive roles. In some cases, women are not represented at all. Most Zambians remember the school learning and teaching materials (such as the *Mulenga and Jelita* series) that were full of images and text that portrayed girls and women in stereotypical roles of housewives, cleaners and house helpers while the boys and men were shown in action going to school, playing football and so on. This has a negative impact on girls’ self esteem and their confidence that they can be achievers in academic as well as non-academic areas.

Watch out for:

- A good mix of males and females in illustrations chosen;
- Male-only images in positions of authority, for example, male doctors with female nurses only;
- Stereotyped of women’s and men’s occupations, for example, housewives, nurses, or mothers in caring roles;
- Tokenism, where lip service is paid to the ‘other’ sex by including an example here and there.

*(See also checklist 6, factsheet 7, factsheet 8, factsheet 10)*

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**What do you do to ensure all publications are gender sensitive?**

1. Review the five steps described in more detail in factsheet 7 and see which areas of the organisation’s publication section needs to be reviewed;
2. Always remain aware of who the target audience are, their education, literacy and language skills;
3. Make use of available statistics on education, literacy and language skills to help you localise the information. This information is available through the Central Statistical Office;
4. Be aware that there are professional translators available within the country and sometimes even at district level. These include the Curriculum Development Centre based in Lusaka as well as the other professionals used particularly by churches at the district level;
5. In selecting someone to develop the graphics and illustrations for the publication, ensure that you select someone who knows about your organisational priorities around promoting gender equality. Also ensure that a brief is made available for this person to guide them on what is expected of them.
Networking is fundamental to effective gender mainstreaming. It is professionally ineffective and personally undermining for organisations and individuals seeking to promote gender equality and women’s empowerment to work alone (Derbyshire, 2002, p.22).

Informal support networks

An informal support network is one made of like-minded people. People attend as individuals, not as organisational representatives. The key issue is that members choose to attend and have a reasonable relationship of trust from the outset. These informal networks provide much-needed personal support in what can be a very stressful and marginalised role. They provide a supportive environment to brainstorm ideas, reflect on experiences and recover from disasters.

Formal internal networks and working parties

These are networks recognised and legitimised by the organisations involved, with people attending in their professional capacity and reporting back. This can include a network of gender focal point persons representing different CSOs.

Electronic networks

There are a number of gender and development internet-based networks. These can be a useful opportunity to share information, ideas and experiences, although clearly access is restricted to those who have the necessary hardware, infrastructure and resources.

There are organisations in Zambia that have specialised in promoting gender equality in different sectors for a long time and there is no need for any organisation to reinvent the wheel. It would therefore be of value to an organisation planning some research to identify an organisation active in undertaking research on and around gender issues and partnering with them. This will enhance the quality of the work.

(See also factsheet 9)

What you can do about enhancing your networking on gender issues?

As an organisation:

1. Take time to find out and create a database of organisations that are undertaking gender related work and particularly note the specific areas of expertise and the field they are working in;

2. Also create a list of individuals that are experts within the gender and development field;

3. Formally and informally make contacts with these organisations and individuals and be sure to engage them for their technical support;

4. As much as possible try to engage in joint ventures such as joint statements, joint projects and joint evaluations.
4. Checklists
Checklist 1: Gender mainstreaming in project design

Adapted from: ILO, 2004

This checklist can be used to assess to what extent gender concerns are integrated into the design of the project. If most of the answers to the following questions are ‘yes’, it means the project in its design is responsive to the needs and concerns of people of both sexes. If more than half of the answers are ‘no’ or ‘not sure’, more attention is needed to make sure that the project will address the needs and concerns of men and women.

**Gender mainstreaming in project design**

<table>
<thead>
<tr>
<th>Problem analysis</th>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Problem analysis</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is data broken down by sex and have you conducted a gender analysis (developed profiles of women and men especially by types of work, workload, working and employment conditions, job levels and income)?</td>
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<tr>
<td><strong>2. Problem analysis</strong></td>
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<tr>
<td>Do you have basic understanding of the gender roles in the community workplace, area or sector? (What do men and women, boys and girls do? What is the division of labour, who decides on what and how is the income divided?)</td>
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<tr>
<td><strong>3. Problem analysis</strong></td>
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<tr>
<td>Do you have basic understanding of the gender relations in the community, area or sector? For example, the customs, traditions, cultural or religious beliefs that affect the way in which men and women, boys and girls play a role in the family, the workplace and in community life.</td>
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<tr>
<td><strong>4. Problem analysis</strong></td>
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<tr>
<td>Have you identified the practical and strategic needs of male and female beneficiaries?</td>
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<tr>
<td>• Practical needs refer to needs linked to basic livelihood and survival such as food, water, shelter, income, clothing, and healthcare</td>
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<tr>
<td>• Strategic needs refer to needs identified to overcome the subordinate position of women and girls and to promote the equal and meaningful participation of boys, girls, men, and women in their family and community</td>
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<tr>
<td><strong>5. Problem analysis</strong></td>
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<tr>
<td>Have you identified any existing gender inequalities in the community, area or sector and if and how these inequalities are being addressed by any other programme or policies?</td>
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<tr>
<td><strong>Strategy development</strong></td>
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<tr>
<td><strong>6. Strategy development</strong></td>
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<tr>
<td>Have you used the outcome of gender analysis when developing the strategy?</td>
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<tr>
<td><strong>7. Strategy development</strong></td>
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<tr>
<td>Have you considered to what extent gender-specific baseline data need to be collected?</td>
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<tr>
<td><strong>8. Strategy development</strong></td>
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<tr>
<td>Have you identified how women and men can equally participate in and benefit from the project?</td>
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<tr>
<td><strong>9. Strategy development</strong></td>
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<tr>
<td>Have you given explicit attention to raising awareness about gender</td>
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<tr>
<td><strong>10</strong></td>
<td>If gender inequalities exist, have you considered whether any gender-specific measures need to be built into the project?</td>
<td></td>
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<tr>
<td><strong>11</strong></td>
<td>Have you fostered the necessary group and institutional structures that encourage the equal participation of both sexes?</td>
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<tr>
<td><strong>12</strong></td>
<td>Have you applied a family- and area-specific approach? This means targeting all members in the families covered by the project.</td>
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<tr>
<td><strong>13</strong></td>
<td>Have you included measures that will address the practical and strategic gender needs of women and men?</td>
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<tr>
<td><strong>Target groups</strong></td>
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<tr>
<td><strong>14</strong></td>
<td>Have you clearly specified the key characteristics and differences in the target groups (intended beneficiaries and direct recipients) by sex, age, type of work, income, ethnic origin, and position?</td>
<td></td>
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<tr>
<td><strong>15</strong></td>
<td>Have you clearly identified how the programme benefits are distributed to the target groups (intended beneficiaries and direct recipients)? If any group has been underrepresented in benefiting from the services in the past, have you identified how the benefits will be made available to them?</td>
<td></td>
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</tr>
<tr>
<td><strong>16</strong></td>
<td>Have you provided for strengthening the capacity of the target groups (intended beneficiaries and direct recipients) to promote gender equality and address inequalities?</td>
<td></td>
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</tr>
<tr>
<td><strong>Institutional framework</strong></td>
<td></td>
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<tr>
<td><strong>17</strong></td>
<td>Have you assessed your organisation’s capacity to address the needs of men and women and to promote gender equality (by considering your mandate, your major areas of intervention, your structure and sex balance among staff, and staff attitudes and capacity to plan, implement and monitor strategies on gender equality promotion)?</td>
<td></td>
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<tr>
<td><strong>18</strong></td>
<td>Have you identified and sought cooperation from organisations with expertise on promoting gender equality, should you need assistance in this respect?</td>
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<tr>
<td><strong>19</strong></td>
<td>Have you made sure both women and men are represented in project advisory or steering committees where they exist?</td>
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<tr>
<td><strong>Objectives</strong></td>
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<tr>
<td><strong>20</strong></td>
<td>Are the objectives gender-specific and explicit?</td>
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<tr>
<td><strong>21</strong></td>
<td>Do the objectives reflect priority concerns of women and men?</td>
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<tr>
<td><strong>22</strong></td>
<td>Do the immediate objectives or the outputs identify the number of female and male intended beneficiaries?</td>
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<tr>
<td><strong>23</strong></td>
<td>If the aims of the project include gender-specific action to redress inequalities, have you designed a specific immediate objective (and corresponding indicators) for this purpose?</td>
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<tr>
<td><strong>Outputs</strong></td>
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<tr>
<td><strong>24</strong></td>
<td>Have you specified the percentages of intended beneficiaries that are...</td>
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<tr>
<td><strong>Volume 2: Gender mainstreaming in projects and policy engagement</strong></td>
<td>39</td>
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<tr>
<td><strong>expected to be male and female?</strong></td>
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<tr>
<td><strong>Have you determined what is needed to develop the institutional capacity towards the promotion of gender equality?</strong></td>
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<tr>
<td><strong>In research: have you made sure that data are disaggregated by sex and that gender relations and inequalities are identified with explicit information about the specific situations, constraints and opportunities of boys and girls, women and men?</strong></td>
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</tr>
<tr>
<td><strong>In training/education: have you stated how many boys and girls, and women and men will be trained, in what areas and at what levels?</strong></td>
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<tr>
<td><strong>In policy making: have you ensured that the roles of women and men, their needs and participation levels, as well as their specific constraints are explicitly taken into consideration? (If too few women are involved in decision making, design specific positive measures in the project to enhance their participation.)</strong></td>
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### Activities

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<tr>
<td><strong>Have you ensured that men and women can participate equally?</strong></td>
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<tr>
<td><strong>Have you identified and used communication channels that will effectively reach girls and women?</strong></td>
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<tr>
<td><strong>Have you organised the location, physical arrangements, timing and duration of programme activities in such a way that all, including girls and women, can participate?</strong></td>
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<tr>
<td><strong>Have you arranged childcare facilities when necessary?</strong></td>
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<tr>
<td><strong>If girls and women cannot speak freely in mixed groups, have you organized separate events and arrange for women staff to communicate with them. It may also be necessary to have male staff work with men (e.g. boys in prostitution).</strong></td>
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<tr>
<td><strong>Have you seized opportunities to demonstrate that the participation of women alongside men in development is beneficial to everyone?</strong></td>
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### Indicators

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<table>
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<tr>
<td><strong>Do you have baseline data? If you do not, have you included a component to collect this data?</strong></td>
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<tr>
<td><strong>Have you checked if the baseline data and indicators are broken down by sex in order to assess the programme impact on the situation of girls and boys, women and men?</strong></td>
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<tr>
<td><strong>From the indicators given, will you be able to measure and evaluate the nature and extent of the benefits provided to boys and girls, men and women?</strong></td>
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### Planning monitoring and evaluation

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<tbody>
<tr>
<td><strong>Have you ensured the systematic collection of data to measure the impact of the programme on men and women?</strong></td>
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<tr>
<td><strong>Have you analysed and followed up on possible differences in the project’s impact on boys, girls, women and men?</strong></td>
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<tr>
<td>Inputs</td>
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<tr>
<td><strong>40</strong></td>
<td>Have you created understanding and encourage commitment among all staff and partners that promoting gender equality is everybody’s responsibility?</td>
</tr>
</tbody>
</table>
| **41** | Have you made sure that managers enact their responsibilities by:  
- Providing active leadership in gender equality promotion?  
- Taking note of early warning signs of gender inequalities?  
- Ensuring specific gender guidance and expertise is provided as necessary? |
| **42** | Have you ensured that sufficient human and financial resources are allocated for the gender components of the project? |
| **43** | Have you verified to what extent gender expertise is required in personnel inputs and if so, have you explicitly stated gender expertise in personnel job descriptions? |
| **44** | If girls and women cannot be effectively reached by male staff, have you determined the number of female staff required? (And vice versa for boys and men) |
| **45** | Have you encouraged an equal balance among male and female staff at all levels and provided equal remuneration for men and women for work of equal value? |
| **46** | Have you promoted the use of proper contracts and ensured the observance of fundamental labour standards and maternity protection in personnel, equipment and subcontracting policies and procedures? |
Checklist 2: Gender mainstreaming in research

Adapted from ILO, 2004

This checklist enables you to quickly assess to what extent a research project’s terms of reference, design and tools (e.g., the questionnaire) include relevant guidance for carrying out gender analysis. In other words, will the research identify possible differences and relations between men and women, and specify inequalities by age, sex, ethnicity and income? If most of the answers to the following questions are ‘yes’, it means the research takes into account gender equality concerns in its design and analysis. If more than half of the answers are ‘no’ or ‘not sure’, more work is needed to integrate a gender dimension into the research design and analysis.

<table>
<thead>
<tr>
<th>Gender mainstreaming in research</th>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Design of the research terms of reference</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1 Have you included a clear gender dimension in the research background? For example: preliminary data on gender roles, gender relations, and existing inequalities, constraints and opportunities for men and women; data specified by sex. If this information is not available, ensure that the TOR includes collection of such data.</td>
<td></td>
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<tr>
<td>2 Have you clearly stated the steps for conducting gender analysis in the research? (See Conducting gender analysis in the research section below)</td>
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<tr>
<td>3 Have you provided gender-responsive guidelines in conducting the research? For example, if girls and women cannot speak freely in mixed groups, arrange for female researchers when carrying out women-only interviews or focus groups. Similarly, arrange for male researchers or interviewers to work with men in certain circumstances such as boys in prostitution.</td>
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</tr>
<tr>
<td><strong>Selecting the research team</strong></td>
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<tr>
<td>4 Have you assessed whether the research team/organisation adequately understands gender equality issues and has the skills to identify inequalities and opportunities for promoting gender equality in their research?</td>
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<tr>
<td>5 Does the research team include both women and men? Determine how women and men in the research team will be involved in the research (e.g., as research designers, field researchers, interviewers).</td>
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<tr>
<td>6 Are gender experts involved in the research design process? This is essential if serious gender inequalities are known to exist.</td>
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<tr>
<td><strong>Conducting gender analysis in the research</strong></td>
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<tr>
<td>7 Have you collected, broken down, analysed and compared quantitative as well as qualitative data by sex and age (along with other key variables such as education, occupation, income, ethnicity)?</td>
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<tr>
<td>8 Have you been attentive to the prevalent sex segregation in the labour markets? Identify the types of work, occupations or sectors in which</td>
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 men and women are typically found.

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<tbody>
<tr>
<td>9</td>
<td>Have you developed a profile for the women and men covered in the research? Identify their roles and activities.</td>
</tr>
<tr>
<td>10</td>
<td><strong>Analysing decision making:</strong> Have you identified to what extent men and women may have different access to and control over available resources and benefits?</td>
</tr>
</tbody>
</table>
| 11 | Have you identified who uses, controls and makes decisions about:  
  - **Resources:** how to spend time and money, how to use land and work tools, or who goes to school and who works, who goes to meetings?  
  - **Benefits:** how to share food and earnings, when and how to use savings? |
| 12 | Have you described any differences found between the roles of men and women in decision making in the family, in the workplace and in the community? |
| 13 | **Analysing gender-specific needs, constraints and opportunities:** Have you identified the practical needs or needs linked to survival (food, water, shelter, job, healthcare, etc.)? |
| 14 | Have you identified the strategic needs or needs identified to overcome subordinate positions (usually of women and girls) and to promote the equal and meaningful participation of men and women in their workplace, family and community? |
| 15 | Have you identified other factors that influence gender relations in the families and communities, as well as in the larger environment? These include factors, such as the fertility rate and other demographic variables, the poverty rate, economic opportunities and performance, labour supply and demand, migration patterns, climate and other environmental variables, cultural values, and the political situation. |
### Checklist 3: Gender mainstreaming in workshops and meetings

Adapted from ILO, 2004

<table>
<thead>
<tr>
<th>Meeting/workshop preparation</th>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
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<tbody>
<tr>
<td>1. Have gender equality priorities been reflected in the selection of the topics and agenda for the event?</td>
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<tr>
<td>2. Have you consulted equally both the relevant men and women in the design of the meeting/workshop?</td>
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<tr>
<td>3. Are all participants made aware of the gender dimensions of the meeting/workshop through background documentation?</td>
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<tr>
<td>4. Are there consistent mechanisms in place to ensure that women and men participate equally in the meeting/workshop as speakers, chairpersons, decision-makers etc., and are equally consulted during preparations?</td>
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<tr>
<td>5. Have you invited related participants and partner organisations that are capable of contributing to the achievement of gender equality? (e.g. Gender in Development Division, Zambia Association for Research and Development, gender focal points/NGOs working on gender equality, Gender/Women’s Studies departments in universities)</td>
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<tr>
<td>6. Have you selected a facilitator for your meeting/workshop who is aware of gender concerns and of your efforts to promote gender equality?</td>
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<tr>
<td>7. If the press are to cover the event, have you routinely informed them of the gender dimensions of your organisation’s special events?</td>
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<tr>
<td>8. Does your registration form include a section that will allow for participants to give details on their sex as well as the position within the organisation they are representing?</td>
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<tr>
<td>9. Have you ensured that the approach and methodology to be engaged will promote the equal participation by both women and men during the event?</td>
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<tr>
<td>10. If there is inadequate participation by one sex, have you identified strategies to mitigate this?</td>
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<tr>
<td><strong>After the meeting/workshop</strong></td>
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<tr>
<td>11. Does the report show how many of the participants were women and how many were men, and what their status was (junior, middle, senior, not known)?</td>
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<tr>
<td>12. Does the report detail, where appropriate, contributions to the event by gender?</td>
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<tr>
<td>13. Once available for circulation, have the education, literacy and learning skills of those to receive the report been analysed to ensure it is in a form that will be of use to the recipients?</td>
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<tr>
<td>14. Is there a mechanism available for receiving feedback on the report from the participants (both women and men)?</td>
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### Checklist 4: Gender mainstreaming in capacity building

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<th>Yes</th>
<th>No</th>
<th>Not sure</th>
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<tbody>
<tr>
<td>1</td>
<td>Have the needs of staff members for training or information on gender mainstreaming been identified?</td>
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<tr>
<td>2</td>
<td>Have these needs been analysed so as to identify the most effective means of meeting them (training, briefing, weekly consultation, one-on-one discussion, etc.)?</td>
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<tr>
<td>3</td>
<td>Has your organisation developed a database of external experts that can assist you in meeting the needs of the staff with regard to gender mainstreaming?</td>
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<td>4</td>
<td>Does the organisation have adequate funds to allow it to meet these needs?</td>
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<td>5</td>
<td>If no funds were allocated initially, has the organisation identified how it will mobilise resources to meet these needs?</td>
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<tr>
<td>6</td>
<td>Has training or capacity building been provided to meet these needs?</td>
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<tr>
<td>7</td>
<td>Have relevant supporting documentation and training materials been identified and provided?</td>
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<tr>
<td>8</td>
<td>Is gender equality information systematically prepared and presented at meetings in order to ensure a productive discussion of gender issues and learning by participants?</td>
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<tr>
<td>9</td>
<td>Have appropriate monitoring mechanisms to measure the impact of training on improved performance been established?</td>
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<tr>
<td>10</td>
<td>Is there a system in place to collect feedback on the relevance and outcomes of the training?</td>
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Checklist 5: Gender audit of publications

Adapted from Kols, 2007

<table>
<thead>
<tr>
<th>Overall</th>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
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<tbody>
<tr>
<td>1 Publication meets information needs of female audience members</td>
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<tr>
<td>2 Publication meets information needs of male audience members</td>
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<tr>
<td>3 Male and female audience members will react to the publication and interpret its messages in the same way</td>
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**Subject matter**

| 4 Advances gender equity                                            |     |    |         |
| 5 Does not reinforce gender stereotypes and prejudices             |     |    |         |
| 6 Presents positive female and male role models                   |     |    |         |
| 7 Addresses special concerns of men and of women                  |     |    |         |
| 8 Does not inappropriately leave out men or women                  |     |    |         |

**Language and writing**

| 9 Match appropriate reading level for audience members of both sexes |     |    |         |
| 10 Are gender-neutral                                               |     |    |         |

**Programme examples, case studies, and training exercises**

| 11 Feature men and women in equal numbers and in a range of roles at home and at work |     |    |         |
| 12 Portray both women and men as active participants in development |     |    |         |

**Illustrations**

| 13 Do not reinforce gender stereotypes and prejudices              |     |    |         |
| 14 Present positive images of men and women in a range of roles at home and at work |     |    |         |
| 15 Have captions that explain content and reject gender stereotypes |     |    |         |

**Design and layout**

| 16 Use simple headers to organise the text                         |     |    |         |
| 17 Format text to make it easier to read                           |     |    |         |
| 18 Use visual cues to point out key information                    |     |    |         |
| 19 Balance text with illustrations and white space                 |     |    |         |

**Dissemination**

| 20 Select communication channels that reach both male and female audience members |     |    |         |
| 21 Use different communication channels for men and women, if necessary |     |    |         |

**Promotion**
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5. Factsheets
Factsheet 1: The Convention on the Elimination of all Forms of Discrimination against Women

The Convention on the Elimination of all Forms of Discrimination against Women (CEDAW), which was adopted by the UN General Assembly in 1979, is the most comprehensive and detailed international agreement on women’s human rights. It establishes rights for women in areas not previously subject to international standards, most notably in personal and family life. It refers specifically to reproductive rights and the rights of rural women, bringing these ‘new’ issues into the global agenda.

CEDAW is the most comprehensive agreement on basic human rights for women, and a critical step in developing a standard for such rights. It contains 30 articles and is based on three main principles:

The principle of equality, stating that:

- Women are entitled to equal opportunities and treatment;
- Women should have equal access to resources;
- Women should not just receive formal equality, but laws may need to be changed and enforced so that results can be seen.

The principle of non-discrimination, stating that:

- Discrimination is socially constructed, exclusionary and not essential to human interaction. It prevents women from enjoying their rights and fulfilling their potential;
- Both direct discrimination (where intent exists) and indirect discrimination (the effect of unintentional actions) need to be actively redressed;
- Temporary measures (specific actions) can be put in place to correct past discrimination;
- Discrimination that occurs in the private sphere needs to be addressed as much as discrimination in the public sphere.

The principle of state obligation, stating that

- Once a state ratifies CEDAW it becomes party to legally binding obligations to eliminate discrimination against women. The state will abide by and be held accountable to the norms and standards mentioned in CEDAW;
- The state is responsible for the welfare of its women and therefore must take measures to protect their rights and redress any inequalities.

The full text of CEDAW is available at [http://www.un.org/womenwatch/daw/cedaw](http://www.un.org/womenwatch/daw/cedaw) along with a list of countries that have ratified it, reservations made by countries to different articles in the convention, and periodic reports submitted by national governmental and non-governmental bodies.
Factsheet 2: The Beijing Declaration and Platform for Action

The Beijing Declaration and Platform for Action (UN Fourth World Conference on Women, 1995) express the agreed commitments of the participating governments, NGOs and donors. The Platform for Action upholds the CEDAW and builds upon previous strategic frameworks and policy commitments at international level.

Critical areas of concern in the Beijing Platform for Action
(UN Fourth World Conference on Women, 1995)

1. The persistent and increasing burden of poverty on women;
2. Inequalities and inadequacies in, and unequal access to, education and training;
3. Inequalities and inadequacies in, and unequal access to, health care and related services;
4. Violence against women;
5. The effects of armed or other kinds of conflict on women, including those living under foreign occupation;
6. Inequality in economic structures and policies, in all forms of productive activities and in access to resources;
7. Inequality between men and women in the sharing of power and decision-making at all levels;
8. Insufficient mechanisms at all levels to promote the advancement of women;
9. Human rights of women;
10. Stereotyping of women and inequality in women’s access to and participation in all communication systems, especially in the media;
11. Gender inequalities in the management of natural resources and in the safeguarding of the environment;
12. Persistent discrimination against and violation of the rights of the girl child.
Factsheet 3: The Millennium Declaration and the Millennium Development Goals

The Millennium Declaration and the Millennium Development Goals (MDGs) were the outcome of the Millennium Summit of September 2000. The Millennium Declaration outlines the central concerns of the global community – peace, security, development, environmental sustainability, human rights and democracy – and sets out a set of mutually reinforcing goals for social development. The eight MDGs are themselves based upon the major goals and targets agreed upon at the UN conferences of the 1990s, and constitute an ambitious agenda for reducing poverty and improving lives worldwide.

Content of the MDGs

Goal 1: Eradication of extreme poverty and hunger
Target for 2015: halve the proportion of people living on less than a dollar a day, and those who suffer from hunger.

Goal 2: Achieve universal primary education
Target for 2015: ensure that all boys and girls complete primary school.

Goal 3: Promote gender equality and empower women

Goal 4: Reduce child mortality
Target for 2015: Reduce by two-thirds the mortality rate amongst children under five.

Goal 5: Improve maternal health
Target for 2015: Reduce by three-quarters the ratio of women dying in childbirth.

Goal 6: Combat HIV/AIDS, malaria and other diseases
Target for 2015: Halt and begin to reverse the spread of HIV/AIDS and the incidence of malaria and other major diseases.

Goal 7: Ensure environmental sustainability
Targets: Integrate the principles of sustainable development into country policies and programmes and reverse the loss of environmental resources. By 2015, reduce by half the proportion of people without access to safe drinking water. By 2020, achieve significant improvement in the lives of at least 100 million slum dwellers.

Goal 8: Develop a global partnership for development with targets for aid trade and debt relief
Targets: Develop further an open trading and financial system that includes a commitment to good governance, development and poverty reduction, nationally and internationally. Address the least developed countries’ special needs, and the special needs of landlocked and small island developing states. Deal comprehensively with developing countries’ debt problems. Develop decent and productive work for youth. In cooperation with pharmaceutical companies, provide access to affordable essential drugs in developing countries. In cooperation with the private sector, make available the benefits of new technologies, especially information and communications technologies.
Factsheet 4: Zambia’s National Gender Policy

Zambia’s National Gender Policy was adopted in March 2000. It is implemented and coordinated by the Gender in Development Division (GIDD).

Principle

To achieve full participation of both women and men in the development process at all levels in order to ensure sustainable development and attainment of equality and equity between sexes.

Objectives

- Redress the existing gender imbalances and provide equal opportunities for women and men;
- Full integration of women in development to ensure their full participation throughout the country.

Implementation

The National Gender Policy has been translated into a Strategic Plan of Action. This addresses gender issues and concerns at all levels of national development. The Strategic Plan of Action contains specific sectors to facilitate its effective implementation.

Priority areas

The National Gender Policy addresses the following gender issues and concerns:

- The power relations between women and men in the domestic, community and public domains which are impediments to the advancement of women;
- The feminisation of poverty as reflected in women’s limited access to and control over productive resources, social services, remunerative employment opportunities and minimal participation in political and managerial decision-making;
- Cultural and traditional practices that systematically subject females to male subordination;
- Limited access by women and girls to and use of basic health services, inadequate reproductive health facilities, maternal and child health care;
- Limited access by women and girls to adequate food, safe water and sanitation;
- Lack of access by women to credit, improved technology, land and extension services which constrain agricultural productivity;
- Disparities in access to and limited opportunities for education, science and technology, skills development and training;
- Lack of appreciation by society that there is a structural linkage between gender and environment;
• The dichotomy between domestic and industrial energy requirements which has left issues of domestic energy requirements largely in the hands of women;
• Statutory and customary laws and practices which hamper women’s and men’s full participation in national development; and
• The prevalence of gender violence.

The policy also takes cognisance of the provisions in the following United Nations conferences and conventions:

• Convention on the Elimination of all forms of Discrimination Against Women, (CEDAW), 1979;
• World Summit for Children, New York, 1990;
• Convention on the Rights of the Child, 1991;
• UN Conference on Environment and Development, Rio de Janeiro, 1992;
• World Conference on Human Rights, Vienna, 1993;
• International Conference on Population and Development, Cairo, 1994;
• World Summit for Social Development, Copenhagen, 1995;
• Fourth World Conference on Women, Beijing, 1995;
• Second UN Conference on Human Settlements (Habitat II), Istanbul, 1996.

Factsheet 5: Gender analysis frameworks

The Harvard Analytical Framework or Gender Roles Framework

The Harvard Analytical Framework (sometimes referred to as the Gender Roles Framework or the Gender Analysis Framework) was developed by researchers at the Harvard Institute of International Development (HIID) in collaboration with USAID’s Office of Women in Development. It represents one of the earliest efforts to systematise attention to both women and men and their different positions in society. It is based upon the idea (labelled the ‘efficiency approach’) that allocating resources to women as well as men in development efforts makes economic sense and will make development itself more efficient.

Key to the Harvard Analytical Framework is adequate data collection at the individual and household level, and it adapts well to agricultural and other rural production systems. Data is collected on men’s and women’s activities, which are identified as either ‘reproductive’ or ‘productive’ and considered according to how they reflect access to and control over income and resources. This highlights “the incentives and constraints under which men and women work in order to anticipate how projects will impact their productive and reproductive activities as well as the responsibilities of other household members.”

Data is collected in three components: an activity profile, an access and control profile that looks at resources and benefits, and a list of influencing factors. The approach provides those with little understanding of gender analysis with useful ways of documenting information in the field. According to one donor, “It makes men’s and women’s work visible.”

Because the approach emphasises gender awareness and does not seek to identify the causes of gender inequalities, it “offers little guidance on how to change existing gender inequalities.” There is the expectation that having good data on gender will, on its own, allow practitioners to address gender concerns in their activities; it assumes that both the problem and the solutions are technical ones. Compared to more recent and more participatory approaches, the Harvard method does not involve informants in describing the development problems they face.


The Moser Gender Planning Framework

This framework, developed by Caroline Moser, links the examination of women’s roles to the larger development planning process. The approach introduces the idea of women’s ‘three roles’ in production, reproduction, and community management (see below), and the implication that these roles have for women’s participation in the development process. In making these links, both between women and the community, and between gender planning and development planning more broadly, Moser’s framework encompasses both the technical and political aspects of gender integration into development.

The framework is composed of several components (or tools). In the first, the triple roles of women are identified by mapping the activities of household members (including children) over the course of 24 hours.
- Reproductive roles – childbearing and rearing, domestic tasks that guarantee the maintenance and reproduction of the current and future work force (e.g. cooking, cleaning, etc.);
- Productive roles – work done for remuneration, in cash or kind (e.g. wage labour, farming, crafts, etc.);
- Community management roles – work that supports collective consumption and maintenance of community resources (e.g. local government, irrigation systems management, education, etc.).

The second component identifies and assesses gender needs, distinguishing between practical needs (to address inadequate living conditions) and strategic needs (for power and control to achieve gender equality).

The third component disaggregates information about access to and control over resources within the household by sex: who makes decisions about the use of different assets.

The fourth component identifies how women manage their various roles, and seeks to clarify how planned interventions will affect each one.

The fifth component, the Women in Development / Gender and Development policy matrix, evaluates how different planning approaches (welfare, equity, anti-poverty, efficiency, and empowerment) have addressed the triple roles and women’s practical and strategic needs.

*Key resources: Moser, 1993.*

**Gender Analysis Matrix**

The Gender Analysis Matrix was developed by A. Rani Parker as a quickly employed tool for identifying how a particular development intervention will affect women and men. It uses a community-based technique to elicit and analyse gender differences and to challenge a community’s assumptions about gender.

Unlike some of the other tools described, this one is explicitly intended for use by the community for self-identification of problems and solutions. The principles of the Gender Analysis Matrix are:

- All requisite knowledge for gender analysis exists among the people whose lives are the subject of the analysis;
- Gender analysis does not require the technical expertise of those outside the community being analysed, except as facilitators;
- Gender analysis cannot be transformative unless the analysis is done by the people being analysed.

Each project objective is analysed at four levels of society: women, men, household and community. The participants carry out the analysis by discussing each project objective in terms of how it impacts on men’s and women’s labour practices, time, resources, and other socio-cultural factors, such as changes in social roles and status.

*Key resources: Parker, 1993.*

**Women’s Empowerment Framework**

The Women’s Empowerment Framework was developed by Sara Hlupekile Longwe, a gender expert from Lusaka, Zambia. Her model is explicitly political, arguing that women’s poverty is the consequence of oppression and exploitation (rather than lack of productivity), and that to reduce poverty women must be empowered.
The framework postulates five progressively greater levels of equality that can be achieved (listed from highest to lowest):

1. Control – equal control over in decision-making over factors of production;
2. Participation – equal participation in decision-making processes related to policymaking, planning and administration;
3. Conscientisation – attaining equal understanding of gender roles and a gender division of labour that is fair and agreeable;
4. Access – equal access to the factors of production by removing discriminatory provisions in the laws;
5. Welfare – having equal access to material welfare (food, income, medical care).

The framework is intended to assist planners to identify what women’s equality and empowerment would mean in practice, and to determine to what extent a development intervention supports greater empowerment.

The tool examines elements of a project’s or sectoral programme’s design to determine if it affects the five different levels of equality negatively, neutrally, or positively.

**Social Relations Approach**

The social relations framework was created by Naila Kabeer at the Institute of Development Studies in Sussex, UK. Drawing on structural feminist roots, it is more broadly oriented than earlier approaches, locating the family and household within the network of social relations connecting them to the community, market, and state. Kabeer writes that the triple roles model formulated by Moser is insufficiently attentive to “the fact that most resources can be produced in a variety of institutional locations (households, markets, states, and communities) so that the same resources may be produced through very different social relations.” In contrast, the Social Relations Approach allows the resulting analysis to show how gender and other inequalities are created and reproduced within structural and institutional factors, and then to design policies that can enable women to work to change those factors that constrain them.

The Social Relations Approach asserts that:

- Development is a process for increasing human well-being (survival, security and autonomy), and not just about economic growth or increased productivity;
- Social relations determine people’s roles, rights, responsibilities and claims over others;
- Institutions are key to producing and maintaining social inequalities, including gender inequalities. Four key institutions are the state, the market, the community and the family. These have rules (how things get done), resources (what is used and/or produced), people (who is in/out, who does what), activities (what is done), and power (who decides, and whose interests are served) – all of which engender social relations;
- The operation of institutions reflects different gender policies. Gender policies differ according to the extent they recognise and address gender issues: gender-blind policies, gender-aware policies, gender-neutral policies, gender-specific policies, and gender-redistributive policies;
- Analysis for planning needs to examine whether immediate, underlying, or structural factors are responsible for the problems, and what their effects on those involved.

*Key resource: Kabeer, 1994.*
Engendering research means that gender is mainstreamed into every component of the research: identifying the problem; defining the conceptual and analytical framework; choosing the methodology; analysing the findings; and disseminating the results.

**Acknowledge our own bias**

Scientific research is not neutral. The position of the researcher, their interests, and values affect how and what research topics are chosen, who they work with, and the perspective and method of research. Even the researcher’s position in society (in term of gender, class, ethnicity, and age) may influence the way in which the research is conducted, how the information is analysed, and how the results are interpreted. Deciding what information is relevant is not always an objective process: local knowledge and information provided by marginalised groups is often given less value than information provided by decision makers, other scientists, or like-minded people. In order to achieve objectivity, it is important to acknowledge our own biases, preferences, values, and socio-cultural background, and to be constantly aware that these factors could influence the process of the research and its findings.

**Define a conceptual framework reflecting men’s and women’s experiences**

There are many aspects to take into consideration in the conceptual framework to avoid a male bias and to ensure an inclusive and gender sensitive approach.

**Ensure gender sensitive formulation of the research question**

The formulation of the research question should integrate a gender perspective: i.e., how are men and women currently affected by the issue and how are they involved in the issue?

**Use inclusive definitions of concepts: avoid male bias, prejudices and generalisations**

If men and women have different experiences related to the field of research, it is likely that they have different definitions of concepts. Gender sensitive research should pay attention to and integrate different perspectives when defining concepts. It can be useful to try to identify if male and female scientists give the same definition and use the same conceptual framework. Including publications by both male and female scientists in the review of literature could be useful for this purpose. It is important not to generalise the concepts to the ‘overall population’ if the issue concerns only men or if only men’s perspectives have been documented. For example, men’s experience of migration may be very different from women’s; however, this does not mean that one is more important than the other. Differences in women’s migration experiences should be considered important and meaningful and, moreover, women migrants should not be considered only as ‘spouses’.
Another problem often faced in research is the use of general concepts that ‘hide’ gender-specific realities. When talking about ‘farmers’ we often assume that the farmers are men. However, women play an important role in farm production, but their work is different. In some contexts women spend more hours than men in production work, but more importance is given to men’s role as owners and income generators.

Hypotheses, analytical frameworks, and models must be based on reality, not on assumptions about gender roles, capacities, and cultural values. Double standards, and overrating or underrating activities related to men or women must be avoided, including:

- prejudices about the capacities of men or women, or about which activities are better suited to one or another;
- placing more value on men’s contribution compared to women’s in the same field;
- placing more value on women’s work in the household, while neglecting the value of women’s work outside the household.

It is also important to recognise the diversity of women’s and men’s experiences: do not judge who is a ‘real’ woman and who is most representative of men’s role according to your own values.

**Develop a gender sensitive methodology**

Questioning the conventional approach to research is important. The usual distant and hierarchical position of researchers has been criticised in recent years, because it often eliminates a wide range of knowledge and raises ethical issues about who is benefiting from the results of the research, and how and for what purpose the results are used. A gender sensitive methodology not only takes into account gender differences in the conceptual and analytical framework, it also uses methods and tools that are participatory, respectful, and accountable.

**Use qualitative tools to capture people’s perspectives and diversity of viewpoints**

If quantitative tools are useful for identifying ‘what’ and ‘how many’, qualitative tools are interesting because they help us to understand ‘how’ and ‘why’. They give a voice to people, even for issues that seem very technical, recognising that both men and women from any socioeconomic background have valuable experiences and knowledge.

**Ensure equitable representation and participation of men and women**

How information is collected and analysed and who is collecting it is important because it influences the quality, authenticity, and value of the information itself. Unless the research is specifically focused on men’s experience (e.g., men’s migration; men’s vulnerability to HIV infection; men’s role in ensuring access to land), making sure that women are equitably represented in the sample population is essential. It is important to include female scientists in the research team as it facilitates the participation of women, especially in a conservative context. It is also useful to have the perspective of female scientists in the analysis process. An additional effort must be made to identify women working in the field of research. If there are none, it could be useful to expand the sample to include some women’s organisations or institutions dedicated to women in order to capture women’s perspectives and experiences. The very limited number of women in the research field should be considered significant information to be considered and reported. Finally, it is important to ensure the qualification of the research team to conduct gender analysis.
Use gender sensitive research tools

It is important to bear the following in mind:

1. It is important to use research’s tools that are not seen as threatening or embarrassing for women or men.
2. It can be very challenging for some women to talk about some issues in front of men from their family or community, or men from outside.
3. Some places or times may be convenient for men, but not for women; this will contribute to the exclusion of women.
4. Written materials are not appropriate when working with illiterate or people with a low level of education and can place a barrier between the researchers and the sample population.
5. In some contexts women have very few opportunities to express their ideas; consequently their knowledge and opinions are often neglected, even by themselves. They are not used to talking in public or to being consulted. Thus, it is important to show interest in their roles and views, to value their experiences, and to have patience. Even if women and men have different roles and experiences, it is important to give them the opportunity to present their points of view on the same subject and pay attention to the similarities and the differences.
6. Often researchers ask different questions to men and women, assuming that they have different levels of interest in the topic. For example, women and men have different roles in the utilisation and management of water; hence, it is often assumed that women are only interested in water for household needs, while men are mainly interested in the use of water for productivity. However, women could also have a strong interest in the utilisation of water for agricultural production, notably for family gardens, as they also participate in farm production and in raising livestock.

Take gender perspective into account in analysis and interpretation

Use and produce gender disaggregated data and conduct a gender analysis. Gender sensitive research uses and produces gender disaggregated data and gender analysis. Documenting differences based on gender does not provide comprehension of gender issues, or why there are differences, inequities, or inequalities. A gender analysis should explain the differences in experiences, viewpoints, and impacts related to gender roles and power relationships.

Gender roles and power relations between men and women are not ‘natural’ or due to the intrinsic ‘nature’ of men or women; they are constructed in a particular socioeconomic and cultural context. This is why the contextualisation of the research is important: it should indicate where the research was conducted; who was involved; who is concerned with the topic; what are the beliefs and practices related to it, and so forth.

A gender analysis should provide information about how men and women are related to, or affected by, the subject of the research. It should take into account the following factors as they are likely to influence how men and women relate to the problem:

- the division of labour, roles, and responsibilities between men and women: who is doing what and what is the link with the research’s topic;
- women and men’s access to and control over resources: natural resources, financial resources, information, decision making processes;
- the power relations in the household, community, society, workplace, and so forth
- the legal and social status of men and women.
**Anticipate impacts of new policies or practices on men and women.** Gender sensitive research should also identify the impacts of new practices or policies on men and women; who will benefit from these; who will be disadvantaged; and the impacts on men and women’s activities and relationships.

**Reporting the findings**

*Highlight the gender dimension.* The reporting process should highlight the gender dimension of the research topic. It should make visible gender differences: different roles, different involvements, different experiences, different opinions, and different needs. It should also provide as much visibility to women’s contributions and experiences as men’s.

*Using gender sensitive language in the research report.* An effective way to highlight the gender dimension of the research’s topic is to use gender sensitive language. Language itself is not neutral and, in most cultures, has largely been forged by men and, therefore, reflects the values of patriarchal society. Generic terms should be used to translate generic situations and gender specific terms to make visible men’s or women’s roles and perspectives. For example, if we are talking about men’s role in rangeland activities, it is better to specify that we are talking about ‘male herders’. If you use the term ‘herders’ to talk about men’s work only, you contribute to hiding women’s role as herders – a role that might be quite different to men’s.

*Advocating for gender sensitive practices.* If the research has been gender sensitive, the findings should also highlight the gender dimension of the topic. The findings could have a great impact on policies and, therefore, should propose equity measures, and promote equality and social inclusion.
Step 1: Build staff skills

This involves having the right staff in place as well as ensuring that staff involved in producing any publications have skills to:

1. Analyse male and female audience members to identify their different information needs and the gender barriers that limit their access to that information;
2. Design and draft a publication that will advance more equitable gender norms and roles in addition to advancing health goals;
3. Use gender-neutral language whenever possible and maintain gender-sensitivity when translating to other languages;
4. Audit and pre-test a draft publication for gender sensitivity;
5. Craft a dissemination strategy that can reach female and male audience members equally;
6. Evaluate whether the publication raised gender awareness and increased access to information among male and female audience members;
7. Evaluate whether the publication unintentionally reinforced gender inequality.

Step 2: Analyse the audience

This is done to guide the content and distribution of the publication. Male and female members of the audience may differ in fundamental ways, including the kinds of work they do, their access to resources and services, their power to make decisions and take action, and as a result, their information needs and priorities (24). Only by conducting a gender analysis can you understand how gender affects the work of various audience members, including their ability to access, understand, and apply the information that will be included in the proposed publication. A gender analysis of the audience does not require an elaborate research effort. It is possible to conduct a rapid, low-cost gender analysis that will provide all the information you need to devise a gender strategy for the publication.

Step 3: Publish the publication

Gender permeates every aspect of a publication, including the choice of subject matter, language, programme examples, training exercises, illustrations, design, and layout. Indeed, there are so many details that can contribute to or detract from a publication’s gender sensitivity that it is best to conduct a formal gender audit of a draft publication and to pre-test it with male and female audience members.

Subject matter

1. Advance gender equity whenever possible;
2. Address the special concerns and information needs of both men and women. Women and men have unique concerns, vulnerabilities, and information needs. Neither sex should be treated as the
norm. Instead, gender-sensitive publications should be inclusive, paying attention to the special interests of each sex as well as to joint concerns;

3. Do not reinforce gender stereotypes and prejudices: publications should never exploit gender inequalities to maximise their distribution or utilisation, for example, by using suggestive photos of women to draw male policy-makers’ attention to factsheets on reproductive health care for sex workers. Mistakes to be avoided include consistently portraying:
   - Women in family roles, men in work roles;
   - Women as innately passive and docile, men as active and in charge; and
   - Women as emotional, men as analytical and technologically savvy;

4. Include positive female and male role models: publications should include positive role models for women and for men.

Language and writing

1. Match the reading level to the audience: literacy also may vary by gender, depending on men’s and women’s access to formal education and performance in school. Thus it is essential to assess the language skills and educational background of the target audience for a publication before deciding on:
   - Reading level (which depends on sentence length, sentence structure, and the familiarity of vocabulary);
   - The use of medical and technical terms;
   - What language to use (the audience’s primary language or a second language that serves as a common tongue);

2. Use gender-neutral language: careless language can subtly promote gender stereotypes or make it unclear exactly who you are talking about;

3. Maintain gender-sensitive language in translations: reproductive health publications are frequently translated into other languages so they can reach a broader audience. If not closely supervised, however, the translation process may undercut efforts to keep the language gender-sensitive. A qualified bilingual translator should be responsible for translating publications and/or for reviewing the quality of translations.

Illustrations

Visual images draw the readers’ attention and may shape their attitudes and opinions even before they read the text. However, illustrations often misrepresent, oversimplify, and/or idealise their subject matter. It is important to keep gender in mind when selecting photos, drawings, and other illustrations.

1. Do not reinforce negative stereotypes: pictures can reinforce gender stereotypes even when their message is supposed to advance gender relations;

2. Present positive images of women and men: positive images – for example, women speaking out at a community meeting or men accompanying their wives during antenatal care visits – can provide role models for readers and help change cultural norms regarding appropriate gender roles. Review illustrations individually and as a group: are men and women depicted with equal frequency and with equal status? What images are missing? For example, are women and men depicted in a full range of roles – at home, at work, and in the community?
Cropping and captioning

While the photographer may choose when and where to take a picture, the editor can alter its meaning by cropping out some elements or by writing a caption that describes the action.

Design and layout

Use design and layout to increase readability. As mentioned above, this is a key concern where there are gender-based disparities in literacy. Print materials are easier for low-literates to read if they:

1. Use simple headers to organise the text;
2. Format all text, including titles, in uppercase and lowercase letters;
3. Underline or use bold for emphasis, rather than all capitals;
4. Employ large, easy-to-read type;
5. Use visual cues, such as circles or arrows, to point out key information; and
6. Balance text with illustrations and white space.

Gender audit and pretesting

1. Conduct a gender audit. When a final draft is complete, ask someone who is not familiar with the publication to conduct a gender audit, using the checklist. The audit should consider the overall impression made by the publication, determine whether it meets the information needs of the audience as set out in the audience analysis and check details of content and design for gender sensitivity.
2. Pre-test draft materials with both female and male audience members. Pretesting is the best way to check the effectiveness of a publication. By including both sexes in the pre-test, you can discover whether it is gender-sensitive as well. Are men and women equally likely to:
   • Understand the messages;
   • Find the content realistic and relevant to their needs;
   • Think the material is visually attractive.

Step 4: Strategically disseminating the publication

If a publication does not reach both female and male members of the audience, the effort made to understand and meet the information needs of both sexes goes to waste. Creating an effective and gender-sensitive dissemination strategy is thus as important as producing a gender-sensitive publication. Equitably distributing materials takes on even more importance in low-resource settings, where publications are often in short supply.

Communication channels

1. Select channels that reach both female and male audience members: investigate which communication channels male and female members of the target audience have access to, and what information sources they prefer. Investigate which communication channels male and female members of the target audience have access to, and what information sources they prefer;
2. If necessary, use different communication channels to reach men and women: there may be no single communication channel that can reach all segments of a given audience. In this case, the solution is to use multiple communication channels, some directed to men and others to women.
Distribution

1. Promote publications to both male and female audience members: make sure that both male and female members of the audience are aware that a publication is available. This means promotional efforts must be directed both to people at the top, who are more likely to be men, and to lower level members of the target audience, who are more likely to be women. Announcements at meetings and other events may reach a broader and more diverse cross-section of the audience than an email notification or newsletter item.

2. Ensure that both men and women receive copies of print publications: mailing lists are the key to equitable distribution by the postal service or email. Make sure the mailing list contains the names and addresses of both women and men; this may require expanding the list to include lower ranking personnel. Distributing copies at an event (such as training workshop, conference, or legislative session) can be a good way to reach the desired audience, as long as you select events both women and men attend in equal numbers. It is more difficult to assure the equitable distribution of a publication when you supply other organisations with multiple copies that they then pass on to individuals.

Step 5: Monitoring and evaluation

Monitoring and evaluation can enable staff to recognise and correct mistakes during the publication process, separately assess the publication’s effectiveness and outcomes for women and men in the audience, and capture lessons learned for the future. To monitor and evaluate publications, evaluators may draw on both quantitative and qualitative data. Quantitative indicators are essential for measuring results and gauging outcomes.

1. Monitor gender strategies throughout the publication process: conduct periodic staff meetings to conduct a gender audit that includes a review of the development and dissemination of publications and allows staff to share experiences and jointly make needed changes;

2. Break down all data by sex: the publication may have different objectives for female and male members of the audience. Even if it does not, assess the effectiveness, outcomes, and benefits of the publication separately for women and for men. This requires collecting all data in a form that can be disaggregated and analysed by sex. Whenever results differ by sex, seek an explanation;

3. Develop indicators to measure the gender outcomes of publications: In addition to evaluating the typical publication outcomes (for example, technical knowledge or counselling skills), examine publication effect on gender awareness and gender equality, while recognizing that changing gender relations is a long-term process. This may require developing additional, new indicators. This type of assessment is most important – and should be most extensive – when gender equity is an explicit goal and/or central topic of a publication;

4. Look for unintended consequences: Even well-intentioned efforts to promote gender equity can backfire. Do not rely solely on pre-planned indicators and instruments to monitor and evaluate the impact of publications on gender issues. Be attentive to unexpected effects on gender roles and relations among readers;

5. Develop and disseminate lessons learned regarding gender issues: Based on the results of the monitoring and evaluation process, consider how your next publication could do a better job of meeting the needs of both men and women and of reaching audience members of both sexes.
Factsheet 8: How to avoid gender-specific pronouns

Source: Kols, 2007

Problem
For writers of English-language publications, the third-person singular pronoun ('he,’ ‘she,’ ‘it’) poses a special challenge. In the absence of a gender-neutral pronoun, writers can easily slip into traditional stereotypes about the sex of clients, providers, and other groups. Unless the sex of a group is clear (for example, pregnant women), use the solutions below to avoid these pronouns.

Solutions
1. **Rewrite the sentence without pronouns.**
   Instead of: ‘If a supervisor wants to assess the actual quality of care offered at a clinic, he should observe some consultations.’
   Write: ‘To assess the actual quality of care offered at a clinic, a supervisor should observe some consultations.’

2. **Make the sentence plural and use ‘they,’ ‘them,’ and ‘their.’**
   Instead of: ‘Voluntary counselling and HIV testing can encourage a client to protect himself and his partner.’
   Write: ‘Voluntary counselling and HIV testing can encourage clients to protect themselves and their partners.’

3. **Write in the first person (‘I’) or second person (‘you’) if it is appropriate to the subject matter, for example, in instructions and guidelines.**
   Instead of: ‘After the nurse explains how to use a contraceptive method, she should make sure the client understands the instructions.’
   Write: ‘After you explain how to use a contraceptive method, make sure the client understands the instructions.’

4. **Use a double pronoun (for example, ‘she or he,’ ‘he/she,’ or ‘s/he’) if you want to stress the action of an individual. When repeated frequently, however, this usage becomes awkward and interrupts the flow of language.**
   Instead of: ‘An adolescent will not return for services if the provider treats her disrespectfully.’
   Write: ‘An adolescent will not return for services if the provider treats her or him disrespectfully.’
5. **Omit possessive pronouns entirely, or use articles (‘the’ or ‘a’) instead.**

   Instead of: ‘The trainer should prepare all of his materials in advance.’
   Write: ‘The trainer should prepare all of the materials in advance.’

6. **Use plural pronouns with ‘everybody,’ ‘anyone,’ ‘nobody,’ ‘someone,’ and other indefinite pronouns. While technically incorrect, this has become acceptable usage in all but the most formal situations.**

   Instead of: ‘Everyone who comes to the clinic must bring her registration card.’
   Write: ‘Everyone who comes to the clinic must bring their registration card.’

7. **Use the passive voice sparingly.**

   Instead of: ‘If a counsellor feels uncomfortable discussing sexual issues, she needs further training.’
   Write: ‘Further training is needed when a counsellor feels uncomfortable discussing sexual issues.’

8. **Alternate between feminine and masculine pronouns to indicate that both genders are included in the group described. Be careful not to confuse the reader.**

   Instead of: ‘Encourage each trainee to participate. Ask yourself: has he had a chance to talk? Has he taken part in a role play?’
   Write: ‘Encourage each trainee to participate. Ask yourself: has she had a chance to talk? Has he taken part in a role play?’
Networking is an approach that is encouraged because there is value in working together with others in trying to achieve set goals. Networks can help CSOs: bypass obstacles to consensus; assemble coalitions for change; marshal and amplify evidence; and mobilise resources.

Great expectation can accompany the establishment of networks, only to find that membership trails off, little is achieved and members cease to meet. To maximise effectiveness, networks need to pay attention to the following:

1. Clear thought to membership: thinking through what each member will contribute and what they will gain, as well as factors concerning the overall coherence and viability of the group;
2. Well thought-out need and goal: it is important for members to reach agreement on a clear purpose and goal. This is motivating and gives a general direction to the group;
3. Good leadership: networks work most effectively when members feel actively involved and responsible. The leader should have a strong commitment to the network goal, respect for the members and a facilitative, inclusive style;
4. Good communication with members: this includes regular meetings, the agenda circulated in advance, and minutes circulated afterwards;
5. Effective and efficient meetings: meetings should give a sense of progress towards the goal, provide an opportunity for members’ views to be heard clear, realistic and agreed action plan. Actions need to be agreed bearing in mind members’ resources, time availability, opportunities, skills, knowledge and influence;
6. Concrete results and credible evidence: achievement is highly motivating. Modest expectations accompanied by tangible progress are more motivating than ambitious goals with no clear strategy for bringing about tangible change. Any data being churned out by the network must be authentic to be credible.
## Factsheet 10: Potential partners and their contact details

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Contact details</th>
</tr>
</thead>
</table>
| Central Statistical Office | Nationalist Road opposite the University Teaching Hospital (UTH)  
P.O. Box 31908  
Lusaka, Zambia  
Telefax: + 260 211 253 468  
E-mail: info@zamstats.gov.zm  
Website: www.zamstats.gov.zm |
| Ministry of Education  
Curriculum Development Centre | Haille Salassi Avenue  
P.O Box 50092  
Lusaka, Zambia  
Tel: +260 211 254 087 |
| Gender in Development Division | Office of the President, Cabinet Office  
PO Box 30208  
Lusaka, Zambia  
Tel: +260 211 253 513 / 254 971  
Fax: +260 211 253 493  
Email: gidd@zamnet.zm  
Website: www.gender.gov.zm |
| University of Zambia  
Department of Gender Studies | Main Campus  
Box 32379. Lusaka 10101  
Zambia  
Tel: +260 211 293 348  
Fax:+260 211 253 952  
Email: dean@hss.unza.zm  
Website: www.unza.zm |
| Non-Governmental Organisations  
Coordinating Council | 5168 Corner of Nchoncho and Chishango Road, Light Industrial Area  
PO Box 37879  
Lusaka, Zambia  
Tel: +260 211 227 517 / 224 727 / 227 529  
Fax: +260 211 227 514  
Email: ngocc@zamnet.zm  
Website: www.ngocc.org.zm |
| Women for Change | Plot 1801 Nchenja Road Northmead  
P.O. Box 33102  
Lusaka, Zambia  
Tel: +260 211 224 309  
Fax: +260 211 224 296  
Email: wfc@zamnet.zm  
Website: www.wfc.org.zm |
| Women and Law in Southern Africa | Plot 6818 Chiwalambwe Road  
Olympia Extension  
Lusaka, Zambia  
Tel/Fax. +260 211 294 989  
Email: wlsazambia@iconnect.zm  
Website: www.wlsa.org.zm |
<table>
<thead>
<tr>
<th>Organization</th>
<th>Address</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Women in Law and Development in Africa</td>
<td>Plot Number 26, Nalubuto Road, Longacres PO Box 31456 Lusaka, Zambia Tel: +260 211 251 491/7 Email: <a href="mailto:wildaf@zamnet.zm">wildaf@zamnet.zm</a> Website: <a href="http://www.wildaf.org">www.wildaf.org</a></td>
<td></td>
</tr>
<tr>
<td>Young Women Christian Association</td>
<td>YWCA National Office, Nationalist Road PO Box 50115 Lusaka, Zambia Tel: +260 211 254 751 / 257 250 Fax: +260 211 254 751 Email: <a href="mailto:ywca@iconnect.zm">ywca@iconnect.zm</a></td>
<td></td>
</tr>
<tr>
<td>Zambia Association for Research and Development</td>
<td>Plot 1517, Manchinchina Road, Northmead PO Box 37386 Lusaka, Zambia Tel: +260 211 224 536 Fax : +260 211 222 883 Email: <a href="mailto:zard@microlink.zm">zard@microlink.zm</a> <a href="mailto:zardwidnet@microlink.zm">zardwidnet@microlink.zm</a> Website: <a href="http://www.widnet.org.zm/partner_zard.php">www.widnet.org.zm/partner_zard.php</a></td>
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6. Sample documents
Sample document 1: A gender analytical framework for beneficiary groups

Source: Derbyshire, 2002

This outline gender analytical framework is designed to assist brainstorming on gender analytical information needs. It is an amalgamation between several commonly used gender planning frameworks and sustainable livelihoods analysis.

<table>
<thead>
<tr>
<th>Category of enquiry</th>
<th>Issues to consider</th>
</tr>
</thead>
</table>
| **Roles and responsibilities** | • Productive roles (paid work, self-employment, and subsistence production)  
• Reproductive roles (domestic work, childcare and care of the sick and elderly)  
• Community participation/self-help (voluntary work for the benefit of the community as a whole)  
• Community politics (representation/decision-making on behalf of the community as a whole) |
| **Assets** | • Human assets (e.g. health services, education, knowledge and skills)  
• Natural assets (e.g. land, labour)  
• Social assets (e.g. social networks)  
• Physical assets (transport, communications) |
| **Power and decision-making** | • Financial assets (capital/income, credit)  
• Household level (e.g. decisions over household expenditure)  
• Community level (e.g. decisions on the management of resources and services)  
• Local government level  
• National government level |
| **Needs, priorities and perspectives** | • Practical gender needs (needs arising in the context of the existing gender roles/assets)  
• Strategic gender needs (i.e. requiring changes to existing gender roles/assets to create greater equality of influence, opportunity and benefit e.g. increasing women’s access to decision-making)  
• Perspectives on improved services and delivery systems such as prioritised services; choice of technology; location; type and cost of services; systems of operation, management and maintenance, etc. |
### Sample document 2: Gender analysis guide for producing publications

Adapted from: Kols, 2007

<table>
<thead>
<tr>
<th>Education, literacy, and language skills</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>How much formal education and job-related training do female and male audience members have?</td>
<td></td>
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<tr>
<td>How literate are male and female audience members in their local language?</td>
<td></td>
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<tr>
<td>Are female and male audience members able to read and understand technical publications on your subject matter?</td>
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</table>

<table>
<thead>
<tr>
<th>Division of labour</th>
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</thead>
<tbody>
<tr>
<td>What jobs do male and female audience members hold? Where do they work? What tasks do they perform? How experienced are they?</td>
<td></td>
</tr>
<tr>
<td>What information do female and male audience members need to do their jobs? How much of that information do they have ready access to?</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Flow of information</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>How much access do male and female audience members have to the following sources of information? What factors limit their access to each one?</td>
<td></td>
</tr>
<tr>
<td>a. Print materials</td>
<td></td>
</tr>
<tr>
<td>b. Computer-based materials: CD-ROMs, email, and the Internet</td>
<td></td>
</tr>
<tr>
<td>c. Libraries and media centres</td>
<td></td>
</tr>
<tr>
<td>d. Training opportunities</td>
<td></td>
</tr>
<tr>
<td>e. Staff meetings</td>
<td></td>
</tr>
<tr>
<td>f. Conferences and workshops</td>
<td></td>
</tr>
<tr>
<td>What social networks do female and male audience members belong to at work? How much and what kinds of information flow through these networks?</td>
<td></td>
</tr>
<tr>
<td>Which members of the audience do, and do not, receive various kinds of information?</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Power and authority</th>
<th></th>
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<tbody>
<tr>
<td>Do female and male audience members rank high or low in the organisation? What opportunities do they have for career advancement?</td>
<td></td>
</tr>
<tr>
<td>Who makes decisions regarding the flow of information in the organisation? Who controls access to specific sources of information?</td>
<td></td>
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<tr>
<td>Does the organisation encourage hoarding or sharing knowledge?</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Social norms and gender roles</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>How do social norms and their own personal experiences affect the attitudes of female and male audience members toward the health issues they are addressing?</td>
<td></td>
</tr>
<tr>
<td>How do social norms and gender roles affect men’s and women’s access to education, job opportunities, and information?</td>
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</tr>
</tbody>
</table>
Sample document 3: Clauses in invitation letters for events

Standard clause in invitation letters to an official meeting called by your organisation:

*In conformity with our commitment to promoting gender equality, the participation of women in [name of the organisation] meetings is encouraged.*

Standard clause in invitation letters to an event you are supporting:

*As [name of the organisation] we are committed to gender equality in all programmes/project activities and encourage participating organisations to ensure that at least 50 percent of their representatives to the event/meeting/workshop are women or men respectively.*
7. Annexes
Glossary of terms

AFFIRMATIVE ACTION: special, usually temporary, measures to redress the effects of past or continuing sex discrimination in order to establish de facto equality of opportunity between men and women. Such measures are targeted at a particular group and are intended to eliminate and prevent discrimination and to offset disadvantages arising from existing attitudes, behaviour and structures based on stereotypes about the division of social roles. Sometimes also termed ‘positive measures’ (ILO, 2007b).

FUNDAMENTAL RIGHTS AT WORK: deriving from the ILO Constitution and set out in the Declaration on Fundamental Principles and Rights at Work are:

1. Freedom of association and the recognition of the right to collective bargaining
2. The elimination of all forms of forced and compulsory labour
3. The abolition of child labour
4. The elimination of discrimination in respect of employment and occupation

The fundamental rights of women workers concern:

1. Equality of opportunity and treatment between men and women in employment
2. Equal pay for work of equal value
3. Better balance between male and female workers with family responsibilities

GENDER: the socially constructed differences and relations between males and females. These vary widely between societies and cultures and change over time (ILO, 2007b).

GENDER BLINDNESS: an attribute of a person, policy or an institution that does not recognise that gender is an essential determinant of the life choices available to people.

GENDER DISCRIMINATION: any distinction, exclusion or preference based on sex or gender values, norms or stereotypes which has the effect of nullifying or impairing equality of opportunity and treatment (Convention concerning Discrimination in Respect of Employment and Occupation). Discrimination may be de jure, meaning that discrimination exists in law, or de facto, meaning that it exists in reality or in practice. In many cases de jure discrimination has declined but de facto discrimination persists (ILO, 2007b).

GENDER EQUALITY: gender equality does not necessarily mean equal numbers of men and women or boys and girls in all activities, nor does it necessarily mean treating men and women or boys and girls exactly the same. It signifies an aspiration to work towards a society in which neither women nor men suffer from poverty in its many forms, and in which women and men are able to live equally fulfilling lives. It means recognising that men and women often have different needs and priorities, face different constraints, have different aspirations and contribute to development in different ways (Derbyshire, 2002, p.6).

GENDER EQUITY: fairness in the treatment for women and men according to their respective needs and interests. This may include equal treatment or treatment that is different but considered equivalent in terms of rights, benefits, obligations and opportunities (ILO 2007b).

GENDER GAP: the disparity between women and men in terms of their levels of participation, access to resources, rights, power and influence, remuneration or benefits. Of particular relevance to gender equality at work are the gender pay gap (the disparity between the average earnings of men and women), and the
The material and non-material resources and assets of a society, based on gender (EC, 2004).

GENDER MAINSTREAMING: although the concept of gender mainstreaming had existed for some years previously, the adoption of gender mainstreaming as the main global strategy for promoting gender equality was clearly established in 1995 at the Fourth World Conference on Women in Beijing (ILO, 2007b). The UN Economic and Social Council defined gender mainstreaming as:

The process of assessing the implications for women and men of any planned action, including legislation, policies or programmes in any area and at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men can benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality. (ECOSOC, 1997)

GENDER NEEDS: needs arising from the differing gender roles between women and men. They can be classified as either ‘practical’ or ‘strategic’ needs:

- Practical gender needs (PGN): the needs women identify in their socially accepted roles in society. PGNs arise out of and do not challenge gender divisions of labour and women’s subordinate position in society. PGNs are a response to immediate and perceived necessity, identified within a specific context. They are practical in nature and often concern inadequacies in living conditions such as water provision, health care and employment.

- Strategic gender needs (SGN): the needs women identify because of their subordinate position in society. They vary according to particular contexts, related to gender divisions of labour, power and control, and may include issues such as legal rights, domestic violence, equal wages and women’s control over their bodies. Meeting SGNs assists women to achieve greater equality and to change existing roles, thereby challenging women’s subordinate position. They are more long-term and less visible than PGNs (Moser, 1993).

GENDER RELATIONS: relations of power which affect who can access and control tangible and intangible resources. Gender relations affect every aspect of employment, working conditions, social protection, representation and voice at work; this is why gender is a cross-cutting issue in the world of work (ILO, 2007b).

GENDER ROLES: learned behaviours in a given society, community or other social group which condition which activities, tasks and responsibilities are perceived as appropriate to males and females respectively. Gender roles are affected by age, socio-economic class, ethnicity, religion and the geographical, economic, political and cultural environment. In many societies the roles of men and women are segregated by sex; for example, boys help their fathers working outside the house on the land and girls help their mothers with household work. In other societies the roles of men and women are increasingly interchangeable; for example, men contribute to household work and women are sometimes the breadwinners in the family. (ILO, 2007b)
**GENDER SENSITIVITY:** applied to projects and programmes, this attribute refers to the inclusion of gender-specific information at all stages of the project or programme and the use of this information to inform analysis and decision-making.

**GENDER STEREOTYPES:** the ideas that people have about what boys and men, girls and women are capable of doing. For example, that women are ‘better housekeepers’ and men are ‘better leaders’.

**GENDER VALUES AND NORMS:** ideas that people have on what men and women of all generations should be like. For example, in many societies women should be obedient and cute and are allowed to cry; men, on the other hand, are expected to be brave and should not cry.

**GLASS CEILING:** an invisible and artificial barrier that militates against women’s access to top decision-making and managerial positions, arising chiefly from a persistent masculine bias in an organisational culture. The glass ceiling is a prime example of discrimination against women and it exists because:

1. Women’s career paths tend to be more circuitous and interrupted than those of men, which are typically linear, and this impedes women’s progress to top positions;
2. Top positions tend to be characterised by values deemed masculine, such as aggressiveness, and suitability is decided mostly according to male criteria;
3. Women are primarily placed in non-strategic sectors rather than in the so called ‘line positions’ that involve financial decision-making or revenue-generating responsibilities, positions that are critical for advancement to the top;
4. Women often have less access to training and career development activities;
5. Women workers often bear more of the burden of family responsibilities than men and so have less time for the extracurricular formal and informal networking essential for advancement in the workplace (ILO, 2007b).

**MULTIPLE BURDEN:** see TRIPLE ROLE.

**SEX:** refers exclusively to the biological differences between men and women, which are universal and do not change. Statistical data are disaggregated according to sex, whereas gender characterises the differing roles, responsibilities, constraints, opportunities and needs of females and males in all areas and in any given social context (ILO, 2007b).

**SEX DISAGGREGATED DATA:** quantitative statistical information on differences and inequalities between women and men. Sex disaggregated data might reveal, for example, quantitative differences between women and men in morbidity and mortality; differences between girls and boys in school attendance, retention and achievement; differences between men and women in access to and repayment of credit; or differences between men and women in voter registration, participation in elections and election to office.

**SEXUAL HARASSMENT:** any unwelcome sexual advances or verbal or physical conduct of a sexual nature, acceptance of which is explicitly or implicitly made a condition for a favourable decisions affecting ones employment, or which has the purpose or effect of unreasonably interfering with the individual’s work performance or creating an intimidating, hostile, abusive or offensive working environment. Sexual harassment is a violation of human rights, a form of discrimination, and a health and safety issue. It offends the dignity and personal integrity of workers. (ILO, 2007b)

**TRIPLE ROLE:** refers to the fact that women tend to work longer and more fragmented days than men as they are usually involved in three different gender roles: reproductive, productive and community work (UNDP, 2002).
Bibliography


PHR (Physicians for Human Rights) (undated) ‘PHR advocacy training: 8 key steps in advocacy,’ PowerPoint presentation accessed at http://www.slideshare.net/bgreenberg/8-key-steps-in-advocacy-presentation


