SOCIAL INCLUSION TOOLKIT

CIVICUS

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ON THE COVER, TOP: Individual, United States. A marcher poses with a "love trumps hate" sign at New York's Pride Parade on 26 June 2016. SOGI and women's rights advocates have long been at the front-lines of opposition and resistance to far-right movements. Viva! PHOTO: MARIA SOSA
BOTTOM: Pilot Programme on Diversity & Inclusion, Democratic Republic of the Congo. COVID-19 sensitisation and distribution of face masks. PHOTO: YOUNG PROFESSIONALS FOR AGRICULTURAL DEVELOPMENT – DEMOCRATIC REPUBLIC OF CONGO

INTRODUCTION
TO THE SOCIAL INCLUSION TOOLKIT

Pilot Programme on Diversity & Inclusion, Goma, Democratic Republic of the Congo Radio show on introducing D&I concepts
PHOTO: YOUNG PROFESSIONALS FOR AGRICULTURAL DEVELOPMENT - DEMOCRATIC REPUBLIC OF CONGO

> "WE RECOGNISED THE NEED TO CREATE A SPACE WHERE THE CONSTITUENTS CAN GROW MUCH MORE DEEPLY AS LEADERS AND CAN BECOME PART OF OUR FUTURE GOVERNANCE."
>
> RESILIENT ROOTS, CIVICUS

WHO IS THIS TOOLKIT FOR?

This toolkit has been designed for civil society organisations (CSOs). It intends to be a useful resource to all staff who are working with these organisations, regardless of their position or title.

The toolkit should also be made accessible to the organisations and members that CSOs work with, in order to help build a shared understanding and knowledge of social inclusion in global civil society.

HOW TO APPLY THE TOOLKIT TO YOUR WORK

The toolkit has been designed to be a practical resource that can be used when designing activities and programmes. It can also be used as an input to more complex planning processes, such as a strategic plan.

A comprehensive guide to undertaking a social inclusion analysis can be found in Section 3. There, readers can follow each step to undertake the analysis, and the information and knowledge they gather in the process will constitute a baseline that CSOs can return to when they plan future activities and programmes.

The toolkit can also be used as a quick reference guide with key definitions, concepts and resources surrounding working with excluded groups.

WHY SOCIAL INCLUSION?

CSOs and civil society more broadly are institutions of power: as the recipients of immense resources and decision-making capacity, their actions and decisions carry significant weight for the lives of excluded populations.[1] Particularly where oppressive regimes are increasingly questioning the legitimacy of CSOs as a strategy to suppress activism, it is more important than ever that civil society lives up to the principles we espouse.

Excluded groups and identities are too often left out from institutions of power and decision-making and from the very processes that affect their lives. CSOs have the potential to become diverse, pluralistic platforms that amplify their voices.

CSOs can close this perceived legitimacy gap between values and practices by ensuring that civil society spaces are accessible and accountable to all groups and by creating legitimate channels and platforms for diverse voices and actors to congregate and build power.

OVERALL OBJECTIVES OF THE TOOLKIT

- To introduce the concept of social inclusion and the importance of reaching groups deliberately left out of civil society and broader civil and political life

- To provide a comprehensive tool to guide CSOs in undertaking a social inclusion analysis and integrating social inclusion considerations into their programmatic cycles

- To consider the long-term institutional requirements for embedding social inclusion through a self-assessment tool

PARTNER ORGANISATIONS

Innovation for Change is a community-led network of seven connected hubs across Africa, Central Asia, East Asia, Latin America and the Caribbean, the Middle East and North Africa, South Asia, and the Pacific dedicated to defending and strengthening civic space and overcoming restrictions to our basic freedoms of association, peaceful assembly and expression.

"DIVERSITY IS THE KEY TO INNOVATION." PARTICIPANT, INNOVATION FOR CHANGE INTER-REGIONAL RETREAT 2018

CIVICUS Youth Assembly. Civil Society Organisations and e-Activism.
PHOTO: CIVICUS

[1] 'Act Big', Disrupt & Innovate, *https://disrupt-and-innovate.org/topics/?alliances.*

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GLOSSARY

Care has been taken to explain key concepts throughout the toolkit. However, please note that this glossary is not an exhaustive list of definitions related to social inclusion. It covers terms relevant to the context of this toolkit and is meant to act as a quick reference in your exploration of social inclusion.

Ableism is a set of beliefs or practices that devalue and discriminate against people with physical, intellectual, or psychiatric disabilities and often rests on the assumption that people with disabilities need to be 'fixed' in one form or the other. Ableism is intertwined in our culture, due to many limiting beliefs about what disability does or does not mean, how able-bodied people learn to treat people with disabilities and how people with disabilities are often not included at the decision-making table.

Ageism is the stereotyping of and discrimination against individuals or groups on the basis of their age. Ageism can take many forms, including prejudicial attitudes, discriminatory practices, or institutional policies and practices that perpetuate stereotypical beliefs.

Civil society is the arena outside of the family, the state and the market created by individual and collective actions, organisations and institutions to advance shared interests. In principle, organised forms of civil society should be accountable to their constituencies and beneficiaries.

Classism is prejudice, stereotyping and discrimination on the basis of social class. It includes individual attitudes, behaviours and systems of policies and practices that are set up to benefit the upper class at the expense of lower classes. Social class can be perceived based on wealth, income, education, occupation and social network.

Gender refers to the expressions, behaviours, roles and identities associated with being masculine and being feminine, including how people perceive themselves and each other, how they act and interact and how power is distributed between them. Gender behaviours, roles and identities are socially constructed, meaning that they are learned through socialisation processes. Gender expression and identity exists along a continuum and can change over time.[2]

Indigenous: Considering the diversity of Indigenous Peoples, an official definition of the term 'Indigenous' has not been adopted by any United Nations (UN)-system body. Instead, the UN system has developed a modern understanding of this term based on the following:
- Self-identification as Indigenous at the individual level and accepted by the community as their member
- Historical continuity with pre-colonial or pre-settler societies
- Strong link to territories and surrounding natural resources
- Distinct social, economic, or political systems
- Distinct language, culture and beliefs
- Form non-dominant groups of society
- Resolve to maintain and reproduce ancestral environments and systems as distinctive peoples and communities
- A question of identity
  - According to the UN, the most fruitful approach is to identify rather than define Indigenous Peoples. This conclusion is based on the fundamental criterion of self-identification as underlined in a number of human rights documents.

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[2]'What is gender? What is sex?', Canadian Institutes of Health Research, April 2020, *https://cihr-irsc.gc.ca/e/48642.html*; 'Understanding Gender', Gender Spectrum, 2019, *https://genderspectrum.org/articles/understanding-gender.*

Intersectionality: The term was coined by US legal scholar Kimberly Crenshaw in 1989. Intersectionality refers to the interaction between gender, race and other categories of difference in individual lives, social practices, institutional arrangements and cultural ideologies and the outcomes of these interactions in terms of their power in society.

- There is a cautionary note, however, on how to use intersectionality for the purpose of advancing social justice aims and creating more equal and inclusive societies. In recent years, the concept has endured a process of de-politicisation and de-radicalisation, which does not live up to its original roots at the heart of the struggles of Black and Brown feminists in the US. As often happens with many concepts that become buzzwords, the true and political meaning of intersectionality sometimes gets lost or is co-opted.

LGBTQI+ means lesbian, gay, bisexual, transgender, queer, questioning, intersex and other distinctions. There can be disagreement within the LGBTQI+ community on the precise definition of some of these terms. We need to be flexible with terminology when working with different groups and should understand that we may need to adapt our language or may need to learn new terms.

Minorities: The UN Minorities Declaration refers to minorities on the basis of their national or ethnic, cultural, religious and linguistic identity and provides that states should protect their existence.
- There is no internationally agreed definition as to which groups constitute minorities, but it is often stressed that the existence of a minority is a question of fact and that any definition must include both objective factors (such as the existence of a shared ethnicity, language or religion) and subjective factors (including that individuals must identify themselves as members of a minority).[3]

Social exclusion happens when individuals are unable to participate in the economic, social, political and cultural life of their society.

Social inclusion means improving the ability, opportunity and dignity of people who are disadvantaged on the basis of their identity to take part in society.

SOGIESC: See 'Gender Unicorn' diagram on page 6.
- **Sexual Orientation:** An identity based on a person's sexual attraction to others and how that person's own gender corresponds to the gender of the people to whom that person is attracted. It also includes a person's capacity for profound emotional, affectional, intimate and sexual relations with individuals of a different gender, the same gender, or more than one gender.
- **Gender Identity:** An individual's internal, deeply felt sense of being a man, a woman, both, neither, or in-between. This may or may not match the individual's biological or legal sex.
- **Gender Expression:** The ways in which gender is presented through actions, clothing, demeanour and more. It is a person's outward-facing self and how that self is interpreted by others based on gender norms.
- **Sexual Characteristics:** Sex (sometimes called biological sex, anatomical sex, or physical sex) is comprised of things like genitals, chromosomes, hormones, body hair and more. However, sex is not gender.

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[3]'Minorities Under International Law', UN Human Rights Office of the High Commissioner (UNOHCHR), *https://www.ohchr.org/en/issues/minorities/pages/internationallaw.aspx.*

People with Disabilities: According to the UN Convention on the Rights of Persons with Disabilities, people with disabilities (PWDs) include people who have long-term physical, mental, intellectual, or sensory impairments which, in interaction with various barriers, may hinder their full and effective participation in society on an equal basis with others.

Power means having influence, authority, or control over people and resources.[4] It can be exercised on an individual, familial, communal, or societal level and on an institutional, systemic, or structural basis. For example, systems and structures of power include colonialism, capitalism and patriarchy.

The Gender Unicorn

Graphic by:

TSER
Trans Student Educational Resources
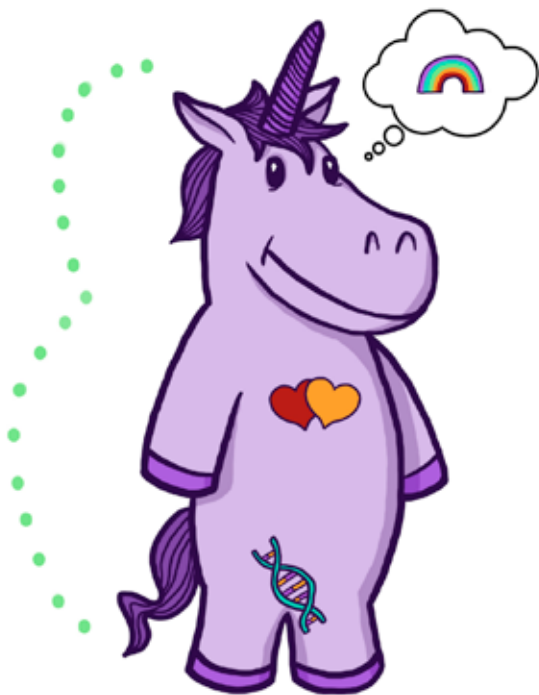
Gender Identity
- Female/Woman/Girl
- Male/Man/Boy
- Other Gender(s)

Gender Expression
- Feminine
- Masculine
- Other

Sex Assigned at Birth
- Female
- Male
- Other/Intersex

Physically Attracted to
- Women
- Men
- Other Gender(s)

Emotionally Attracted to
- Women
- Men
- Other Gender(s)

To learn more, go to:
www.transstudent.org/gender

Design by Landyn Pan and Anna Moore

SECTION 1
UNDERSTANDING SOCIAL INCLUSION

Social exclusion is when individuals or groups are unable to participate in the economic, social, political and cultural life of their society due to their race, gender, sexuality, religion, class, disability, age, or other category of difference.

Beall and Piron explain how marginalised groups can become caught in this cycle of exile, excluded from each domain of society.[5] See Figure 1 below.

FIGURE 1
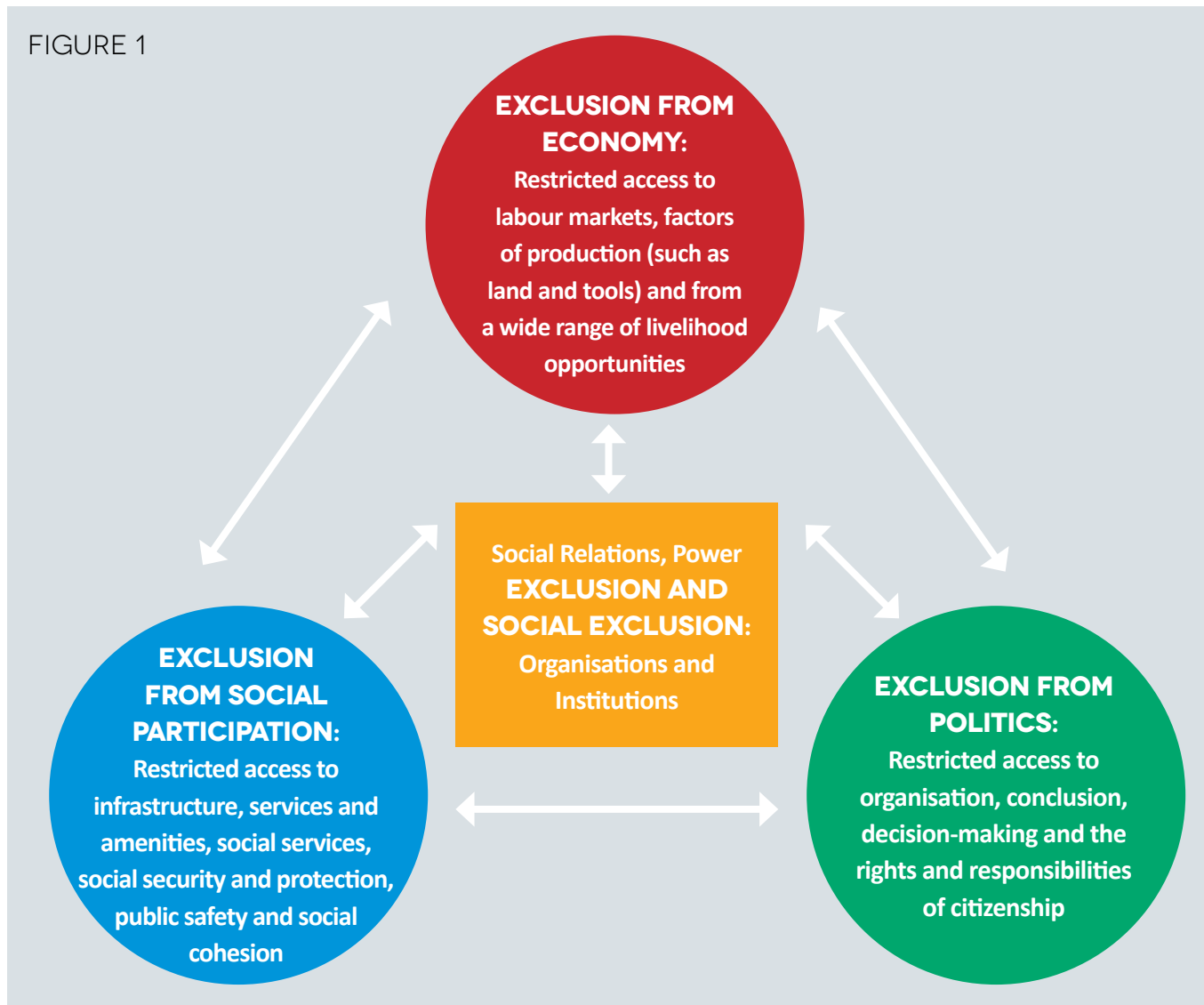
Through this dynamic process, excluded groups are also denied access to powerful institutions and organisations. They can be deprived of their personal agency and control over important decisions, often leading to feelings of alienation and inferiority.[6]

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[5]'DFID Social Exclusion Review', Jo Beal and Laure-Hélène Piron, May 2005, *https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/2301.pdf*.

[6]'An Indicative Review of UNESCO's Work on Social Inclusion: A UNESCO-ODI Study of Promising Practices in the Field of Social Inclusion', United Nations Educational, Scientific and Cultural Organization and Overseas Development Institute, 2015, *http://unesdoc.unesco.org/images/0024/002431/243129e.pdf*.

SO, WHAT IS SOCIAL INCLUSION?

- How we improve the terms for excluded individuals and groups to take part in society.

- How we improve the ability, opportunity and dignity of excluded individuals and groups to take part in society.

- How we dismantle the laws, policies, institutions and attitudes that sustain their isolation.[7]

A NOTE ON PARTICIPATION

Participation is both a process and a goal. To influence the decisions that affect your life is an empowering process. It builds confidence and cultivates a sense of agency and voice. Through the process of influencing decisions, excluded groups can affect the attitudes, norms, institutions and policies that drive social exclusion, leading to long-term structural changes and the reversal of their excluded status.

Given the challenges and barriers experienced by excluded groups, their participation in decision-making processes must be meaningful. It requires inclusion at all stages and must avoid tokenism, and instead open opportunities for engagement, contribution and feedback.

Pilot Programme on Diversity & Inclusion, Fiji. Sexual Harassment Awareness and Prevention in the Workplace training.

PHOTO: RAINBOW PRIDE FOUNDATION

[7]Ibid.

ACTIVITY

As CSOs representing the interests of diverse citizens, consider how your organisation can embody these principles of inclusion and diversity:

1. *Do your organisation's communications currently promote positive narratives of an inclusive society?*

   _____

2. *How can your organisation help to ensure equal access to information by translating materials into accessible formats and to other languages?*

   _____

   _____

3. *How can your organisation promote a culture that celebrates diversity?*

   _____

   _____

4. *What other inclusion-promoting strategies could your organisation devise?*

   _____

   _____

Note: Adapted from the UN Department of Economic and Social Affairs (UNDESA) tool for promoting social inclusion.[8]

WHAT IS INTERSECTIONALITY?

Intersectionality refers to the interaction between race, gender, sexuality, religion, class, disability, age and other categories of difference in individual lives, social practices, institutional arrangements and cultural ideologies and the outcomes of these interactions in terms of an individual's or group's power in society. The following diagram contains indicative examples of identities and is by no means an exhaustive typology of identities.

[8]'Creating an Inclusive Society: Practical Strategies to Promote Social Integration', UN Department of Economic and Social Affairs (UNDESA), 2009, http://www.un.org/esa/socdev/egms/docs/2009/Ghana/inclusive-society.pdf.

FIGURE 2

Note: Developed by YW Boston.[9]

Everyone has multiple identities. People are members of more than one group at the same time and thus can experience oppression and privilege simultaneously. For example, a doctor can be respected in her profession but can also experience domestic violence at home.[10]

Taking an intersectional approach is an important tool in the programming toolbox. Just as gender-insensitive programming is likely to fail, so are blunt instruments that slot people into simplistic categories like 'poor', 'young', 'rural', 'lesbian', 'gay', or 'Afro-descendant', or that take a binary view of 'women' versus 'men'.

There is an intersectional analysis tool in Section 3 of this toolkit that can support you in your work. As a first step, please complete the self-reflection activity below, along with other staff. This activity will allow you to explore your personal experiences of privilege and oppression as a means of guiding you in your work with excluded groups.

[9] 'What is intersectionality, and what does it have to do with me?', YW Boston, March 2017, *https://www.ywboston.org/2017/03/what-is-intersectionality-and-what-does-it-have-to-do-with-me.*

[10] 'Power, Inclusion and Rights-Based Approaches: The ActionAid Gender Equality & RBA Resource Kit', ActionAid, 2006, *https://actionaid.org/publications/2006/gender-equality-resource-kit#downloads.*

TEAM ACTIVITY:

PURPOSE: *Working with excluded groups requires an active awareness of our own identities and how our experiences of privilege, oppression and power intersect. These experiences shape our values and our capacity to understand others, and they inform the biases that we could unconsciously hold.*

Note: This activity is not meant to make anyone feel guilty or ashamed of their experiences. Rather, it seeks to highlight the fact that everyone experiences both privilege and oppression. By understanding and accepting this fact, we can recognise the ways that our privileges can be leveraged individually and collectively for the cause of social justice.

INSTRUCTIONS:

1. **You will be given five sticky notes. On each one, write down a different aspect of your identity. (Example: Black on the first one, asexual on the second one, English-speaking on the third one, etc.)**

2. **When each of your sticky notes has an identity written on it, stick all of them to the board.**

3. **Now, have the facilitator aggregate sticky notes with similar identities on the board. (Example: Sticky notes of people with disabilities can be grouped together, sticky notes of women can be grouped together, sticky notes of young people can be grouped together.)**

4. **Once the sticky notes are aggregated, have the facilitator moderate discussion surrounding the following initial reflection questions:**

   a. What do you notice?

   _____

   _____

   _____

   _____

   b. What identities are represented? Which ones are missing?

   _____

   _____

   _____

   _____

c. What identities does the group share? Which ones are not shared?

_____

_____

_____

_____

5. **Once these initial reflection questions have been discussed, have the facilitator moderate the following in-depth reflection questions:**

a. Do you think that the privileges and oppressions noted on your sticky notes are obvious to your colleagues?

_____

_____

_____

_____

b. What does it mean for us to have intersecting identities where we can experience both privilege and oppression? How can privilege and oppression exist together?

_____

_____

_____

_____

c. What does your intersectional identity mean for your work at your organisation?

_____

_____

_____

_____
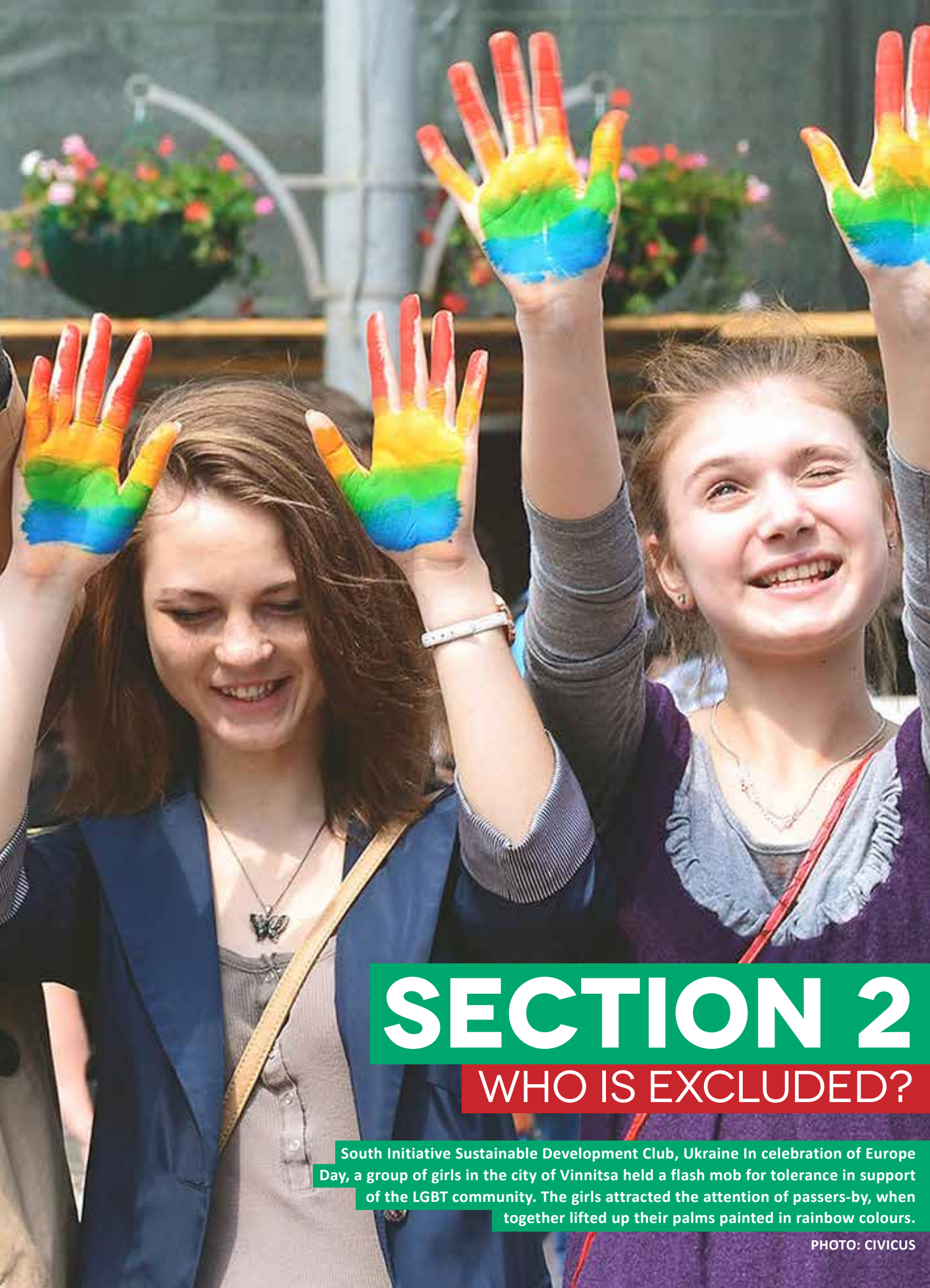
SECTION 2
WHO IS EXCLUDED?

South Initiative Sustainable Development Club, Ukraine In celebration of Europe Day, a group of girls in the city of Vinnitsa held a flash mob for tolerance in support of the LGBT community. The girls attracted the attention of passers-by, when together lifted up their palms painted in rainbow colours.

PHOTO: CIVICUS

Section 2 focuses on key historically excluded groups and analyses current global trends surrounding their exclusion. It then outlines an exercise that CSOs can undertake to apply this analysis to their own contexts, taking into consideration the local cultural, political, economic and social trends that shape their experiences. Please note that this list of excluded groups and the accompanying exercise is not exhaustive.

Note: It is recommended that CSOs also undertake a comprehensive social inclusion analysis in order to identify priority populations methodically, informed by data and analysis. This analysis will be elaborated in Section 3.

Latin America must defend women who defend human rights. CIVICUS participates in the 62nd Commission on the Status of Women focused on empowering women activists working in rural communities.

PHOTO: CIVICUS

WHO ARE WE TALKING ABOUT?

As discussed in Section 1, social exclusion has multiple dimensions and the experience of exclusion is unique to the individual, based on their intersecting identities.

However, exclusion can also be said to have universal characteristics. Regardless of which country or region you work in, age, sex, disability, race, ethnicity, religion, migration status, socio-economic status, place of residence, sexual orientation and gender identity have all been grounds for social exclusion over time.[11] Excluded groups have restricted access to civic and political life, and this restricted access leads to and maintains cycles of exclusion. Disadvantage is heightened where multiple or intersecting grounds for discrimination are involved.[12]

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[11]'Leaving No One Behind: The Imperative of Inclusive Development', UNDESA, 2016, *https://www.un.org/development/desa/dspd/world-social-report/rwss2016.html*.

[12]For example, see 'Report of the Independent Expert on Minority Issues, Gay McDougall', UN Human Rights Council (UNHRC), January 2010, *https://www2.ohchr.org/english/bodies/hrcouncil/docs/13session/A-HRC-13-23.pdf*; 'General Recommendation No. 28 on Core Obligations of States under Article 2 of the Convention on the Elimination of All Forms of Discrimination against Women', Committee on the Elimination of Discrimination against Women, December 2010, *https://tbinternet.ohchr.org/_layouts/15/treatybodyexternal/Download.aspx?symbolno=CEDAW/C/GC/28&Lang=en*; 'General Recommendation No, 25 on Gender-Related Dimensions of Racial Discrimination', Committee on the Elimination of Racial Discrimination, March 2000, *https://tbinternet.ohchr.org/_layouts/15/treatybodyexternal/TBSearch.aspx?Lang=en&TreatyID=6&DocTypeID=11*.

INDIVIDUALS, IDENTITIES OR GROUPS?

It is helpful to differentiate between:

• Individuals who are members of a particular group, who may share some values and beliefs, and who may act as a community. A religious or ethnic group are examples.

• Individuals who share characteristics with a group, but who do not necessarily identify as a member of that group. These individuals may not have much in common besides the discrimination that they face. Their intersectional identities produce experiences that may differ from one another. An example is people with disabilities or individuals who belong to a particular age category.

For the purposes of this toolkit and for ease of reference, we refer to both types of identities as 'groups'.

LGBTQI+ PEOPLE

Sexual orientation and gender identity and expression are integral aspects of our selves. Despite this reality, LGBTQI+ groups have been targets of state-sponsored and societal violence. It is critical that LGBTQI+ communities have the legal rights and space to actively participate in the civil society of their own countries.

> "I APPEAL TO ALL GOVERNMENTS AND SOCIETIES TO BUILD A WORLD WHERE NO ONE HAS TO BE AFRAID BECAUSE OF THEIR SEXUAL ORIENTATION AND GENDER IDENTITY."
>
> ANTÓNIO GUTERRES, UN SECRETARY–GENERAL

Pilot Programme on Diversity & Inclusion, Fiji. Sexual Harassment Awareness and Prevention in the Workplace training.

PHOTO: RAINBOW PRIDE FOUNDATION

UNDERSTANDING IDENTITIES[13]

- **Sexual Orientation (SO)** describes to whom a person is sexually and emotionally attracted. Some people are attracted to people of a particular gender, others are attracted to people of more than one gender and others are not attracted to anyone. Asexual, bisexual, gay, lesbian, pansexual/fluid, questioning, queer and straight all describe sexual orientations that are represented by the term LGBTQI+.

- **Gender Identity (GI)/Gender Expression (GE)** describes the ways in which a person identifies or expresses their gender. One's gender identity is one's internal sense of self, while one's gender expression is how one embodies gender presentations, attributes, roles and more. Androgynism, cisgender, crossdresser, gender queer/third gender/gender fluid, transgender, transsexual and two-spirit all describe gender identities and gender expressions.

- **Sex Characteristics (SC)**, including genitals, gonads and chromosome patterns, do not always fit binary notions of male or female bodies. Intersex people experience these diverse sex characteristics. Because their bodies are seen as different, intersex children and adults are often stigmatised and subjected to human rights violations.

BARRIERS TO LGBTQI+ PARTICIPATION IN CIVIC AND POLITICAL LIFE

Same-sex relationships are criminalised in 68 countries and territories, with the death sentence implemented in eight countries.[14]
It is important to point out that there has been progress here. A number of countries have legalised same-sex marriage, including Costa Rica, Ecuador and Taiwan, while others have decriminalised laws against same-sex relations, including Angola, India and Gabon.

There are barriers to LGBTQI+ communities establishing and registering CSOs in 41 states.[15]
In many restrictive regimes, LGBTQI+ CSOs are pushed underground, while larger organisations may shy away from advocating on LGBTQI+ human rights issues.

A growing trend of state-sponsored and societal violence has been detected globally.
In 2019, this violence was marked by arbitrary arrests, state-sponsored discrimination and attacks against LGBTQI+ people.[16]

Systemic attacks against LGBTQI+ human rights defenders continue.
Human rights defenders working to combat violence against LGBTQI+ groups face multiple and aggravated forms of violence and discrimination.

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[13]Glossary of LGBT Terms for Health Care Teams', National LGBT Health Education Center, March 2016, *https://www. lgbtqiahealtheducation.org/wp-content/uploads/LGBT-Glossary_March2016.pdf*; 'Basic Definitions: Sexual Orientation, Gender Identity and Expression (SOGIE)', UPMC Children's Hospital of Pittsburgh, *https://www.chp.edu/-/media/chp/departments-and-services/adolescent-and-young-adult-medicine/documents/gender-and-sexual-development/basic-definitions-sogie.pdf?la=en*; 'Acronyms and Definitions', Parliamentarians for Global Change, 2020, *https://www.pgaction.org/inclusion/background/acronyms. html#:~:text=SOGIESC%3A,they%20were%20assigned%20at%20birth*.
[14]'Sexual Orientation Laws in the World – 2019', International Lesbian, Gay, Bisexual, Trans and Intersex Association (ILGA), 2019, *https:// ilga.org/sites/default/files/ilga_sexual_orientation_laws_map_2019.jpg*.
[15]'State-Sponsored Homophobia: Global Legislation Overview Update', ILGA, December 2019, *https://ilga.org/downloads/ILGA_World_ State_Sponsored_Homophobia_report_global_legislation_overview_update_December_2019.pdf*.
[16]'World Report 2020', Human Rights Watch, 2020, *https://www.hrw.org/world-report/2020*.

ACTIVITY

1. *What is the overall status of LGBTQI+ people in your country or region?*

_____

_____

_____

2. *How do existing societal perceptions, beliefs and values impact on LGBTQI+ people's ability to interact with and participate in civil society?*

_____

_____

_____

_____

3. *If they exist, how do discriminatory laws, policies and practices at national or local levels limit LGBTQI+ people's interaction and participation in civil society?*

_____

_____

_____

_____

4. *If they are actively engaged in civil society, what types of CSOs do LGBTQI+ people mostly participate in?*

_____

_____

_____

_____

5. *Do CSOs in your country or region currently support LGBTQI+ people through their experiences of human rights violations? If so, how? If not, why not?*

_____

_____

_____

_____

6. *What services could help to enhance LGBTQI+ people's engagement in civil society?*

_____

_____

_____

_____

7. *How do your responses to the above questions change when considering LGBTQI+ people with different intersections?*

_____

_____

_____

_____

YOUNG PEOPLE

> "A YOUNG PERSON'S ABILITY TO EFFECTIVELY ENGAGE RELIES HEAVILY ON THE SOCIOECONOMIC AND POLITICAL ENVIRONMENT IN WHICH THEY LIVE. WHILE ACCESS TO FREE AND OPEN INTERNET, POLITICAL DEMONSTRATIONS AND PEACEBUILDING INITIATIVES CAN CONFER LONG TERM BENEFITS TO BOTH THE INDIVIDUAL AND COMMUNITY, A LACK OF DECENT JOBS, LIMITED ACCESS TO LABOUR RIGHTS AND SOCIAL SERVICE SPENDING CAN IMPOSE LONG–TERM NEGATIVE CONSEQUENCES ON A YOUNG PERSON'S LIFE–LONG ABILITY TO ENGAGE."[17]

UNDERSTANDING IDENTITIES

Young people make up a diverse and heterogeneous group. The experience of being young varies enormously across regions and within countries: While the UN's definition of youth includes people from ages 15 to 24, there are regional variations.[18] For example, the African Union categorises youth as being up to 35 years old.[19] Due to the growing proportion of populations who are young, there has been increased policy focus and interest in young people. At the same time, policies and programmes have failed to take into consideration the nuanced and complex experiences of young people based on their diverse intersections, as well as the ways in which educational attainment and access to assets shape their experiences.

BARRIERS TO YOUNG PEOPLE'S PARTICIPATION IN CIVIC AND POLITICAL LIFE

Since young people and children make up almost half of the world's population, there is a demographic imperative to involve young people in civil society processes.[20]

Young people represent a greater proportion of refugees, 13 per cent, when compared to 11 per cent of the world's population and 9 per cent of international migrants.[21]

Restrictive funding practices, coordination challenges and power imbalances prevent young people from organising and mobilising in civil society.[22]

Legal barriers also exist for young people. In many countries, a person must be 25 years or older to be eligible for national parliament.[23]

[17] 'Youth Civic Engagement', UNDESA, 2015, *https://www.un.org/development/desa/youth/wp-content/uploads/sites/21/2018/12/wyr_civic_engagement_executive_summary.pdf*.

[18] 'Youth', UN, *https://www.un.org/en/sections/issues-depth/youth-0*.

[19] 'African Youth Charter', African Union Commission, *https://www.un.org/en/africa/osaa/pdf/au/african_youth_charter_2006.pdf*.

[20] 'Chart: How is the World's Youth Population Changing?', World Bank, April 2017, *https://blogs.worldbank.org/opendata/chart-how-worlds-youth-population-changing*.

[21] 'Global Trends: Forced Displacement in 2019', UN High Commissioner for Refugees, 2019, *https://www.unhcr.org/5ee200e37.pdf*.

[22] 'Towards a Thriving, Credible, and Sustainable Youth Civil Society', Development Alternative, April 2019, *https://restlessdevelopment.org/wp-content/uploads/2020/07/Development-Alternative-Youth-Civil-Society-Report.pdf*.

[23] 'Youth-Led Accountability', Restless Development, *www.restlessdevelopment.org/youth-led-accountability*.

ACTIVITY

1. What are the age demographics of your country or region?

_____

_____

_____

2. What intersectional identities do young people around you experience?

_____

_____

_____

3. What is the unemployment rate amongst young people in your country or region?

_____

_____

_____

4. How do young people around you access information and resources?

_____

_____

_____

5. How do labour and time commitments affect young people's ability to engage in civil society?

_____

_____

_____

6. *How do existing societal perceptions, beliefs and values impact on young people's engagement with civil society?*

_____

_____

_____

7. *How does the legal framework of your country impact on young people's engagement with civil society?*

_____

_____

_____

8. *What types of CSOs do populations of various ages participate in?*

_____

_____

_____

9. *Do CSOs in your country or region currently cater to the needs of young people? If so, how? If not, why?*

_____

_____

_____

10. *What services could help to enhance young people's engagement in civil society?*

_____

_____

_____

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CIVICUS World Assembly
PHOTO: TRISTAN BRAND

"THE PARTICIPATION OF PERSONS BELONGING TO MINORITIES IN PUBLIC AFFAIRS, AND IN ALL ASPECTS OF THE POLITICAL, ECONOMIC, SOCIAL AND CULTURAL LIFE OF THE COUNTRY WHERE THEY LIVE, IS IN FACT ESSENTIAL TO PRESERVING THEIR IDENTITY AND COMBATING SOCIAL EXCLUSION."[24]

MINORITIES

UNDERSTANDING IDENTITIES

- **Indigenous Peoples** are culturally distinct individuals and societies. The UN recognises the difficulty in defining such a diverse group of people, and instead, looks to certain characteristics such as distinct social, economic and political systems and strong links to lands and territories to distinguish Indigenous Peoples. In some countries, there may be preference for other terms, including tribes, first peoples, first nations, ethnic groups, *adivasi* and *janajati*.[25]

- **Minorities:** The UN Minorities Declaration refers to minorities on the basis of their national or ethnic, cultural, religious and linguistic identity and provides that states should protect their existence. There is no internationally agreed definition as to which groups constitute minorities, but it is often stressed that the existence of a minority is a question of fact and that any definition must include both objective factors (such as the existence of a shared ethnicity, language or religion) and subjective factors (including that individuals must identify themselves as members of a minority).[26]

- A useful distinction: "**Race** is fundamentally a social construct. **Ethnicity** is a term that describes shared culture and national origin. **Minority** groups are defined by their lack of power."[27]

[24]'Minority Rights: International Standards and Guidance for Implementation', UNOHCHR, 2010, *https://www.ohchr.org/Documents/Publications/MinorityRights_en.pdf.*

[25]'Who are Indigenous Peoples?', UN Permanent Forum on Indigenous Issues, *https://www.un.org/esa/socdev/unpfii/documents/5session_factsheet1.pdf.*

[26]UNOHCHR, op. cit.

[27]'Racial, Ethnic, and Minority Groups', Lumen Learning, *https://courses.lumenlearning.com/sociology/chapter/racial-ethnic-and-minority-groups.*

BARRIERS TO MINORITY GROUPS' PARTICIPATION IN CIVIC AND POLITICAL LIFE

In many countries, ethnic minorities are denied formal recognition and citizenship. In the case of the Muslim Rohingya minority in Myanmar, the denial of citizenship has effectively rendered them stateless. Persons belonging to minority groups remain underrepresented in political and public processes and governing institutions in most countries.[28]

Recent mass movements of people displaced by violent conflict and climate emergencies have led to exclusion, as political forces have mobilised against newly arrived migrant populations. States and right-wing nationalist and populist politicians demonise migrants and refugees for political gain, making their already precarious situation even worse.

Migrants and refugees seek to access civic freedoms and to have a say in their communities, workplaces and on the decisions that affect their lives. Studies show that the extent to which the rights of migrants and refugees are respected is an indicator of the broader status of human rights in a country.[29]

In 2019, 212 land and environmental defenders were killed around the world.[30] Environmental defenders, a large number of whom are Indigenous Peoples, are targeted with violence and potentially face death.

India

PHOTO: VIDEO VOLUNTEERS

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[28]'Factors that impede equal political participation and steps to overcome those challenges: Report of the Office of the United Nations High Commissioner for Human Rights', UNHRC, June 2014, *https://digitallibrary.un.org/record/777756?ln=en*.

[29]For example, see 'Freedoms on the Move: The Civic Space of Migrant Workers and Refugees', Solidarity Centre & CIVICUS, October 2019, *https://www.civicus.org/documents/reports-and-publications/freedoms-on-the-move/freedoms-on-the-move-report_oct2019.pdf*.

[30]'Defending Tomorrow: The Climate Crisis and Threats against Land and Environmental Defenders', Global Witness, 2020, *https://www.globalwitness.org/en/campaigns/environmental-activists/defending-tomorrow/*.

ACTIVITY

1. *What range of ethnicities can be found in your country or region? Are there newly arrived migrants?*

_____

_____

2. *Who are the Indigenous Peoples of your country or region?*

_____

_____

3. *Are there differences between how ethnic minorities access information and resources in your country or region? If so, what do these differences look like?*

_____

_____

4. *What labour commitments and time constraints affect ethnic minorities' engagement with civil society?*

_____

_____

_____

5. *In your country or region, what differences exist among ethnic minorities in terms of their perceptions, beliefs and knowledge of civil society? How do these differences affect their engagement with civil society?*

_____

_____

_____

6. *In your country or region, what differences exist between ethnic minorities in formal decision-making rights and practices? How do these differences affect their engagement with civil society?*

_____

_____

_____

7. *If they exist, how do discriminatory laws, policies and practices at national or local levels limit the engagement of ethnic minorities with civil society?*

_____

_____

_____

8. *How many ethnic minorities are represented at leadership levels in your CSO?*

_____

_____

_____

9. *What services could help ethnic minorities to engage more fully with civil society?*

_____

_____

_____

PEOPLE WITH DISABILITIES

Fifteen per cent of the world's population lives with some form of disability.[32] Women comprise nearly three-quarters of all people with disabilities in the global south.[33] People with disabilities are often denied the opportunities of full participation in the socio-economic and cultural systems of which they are a part. This deprivation occurs through physical and social barriers and discriminatory laws and practices that have evolved from ignorance, indifference and fear.

In most parts of the world, there are deep and persistent negative stereotypes and prejudices against people with disabilities, leading to their social exclusion and lack of access to civic space.

> "THE PARTICIPATION OF PERSONS WITH DISABILITIES IN POLITICAL, PUBLIC AND SOCIAL LIFE IS CRUCIAL IN ORDER TO FIGHT STEREOTYPES, PREJUDICES AND EXCLUSION."[31]

UNDERSTANDING IDENTITIES

The Convention on the Rights of Persons with Disabilities acknowledges that **"disability is an evolving concept"**, and this fact is true of the language that is used to describe disability. Person-first terminology (i.e. people with disabilities) acknowledges that **the disability is an attribute**, like hair or eye colour, and not the whole of the person. When in doubt, **it is always best to ask people with disabilities or disable people's organisations (DPOs)** for advice.

GenderLinks, South Africa
Members of an association of people with disabilities in Swaziland making their voices heard during the 16 Days of Activism against Gender-Based Violence in the capital of Mbabane.

PHOTO: THANDOKUHLE DLAMINI

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[31] 'Persons with Disabilities and Ensuring their Right to Participate in Political and Public Life', Organization for Security and Co-operation in Europe (OSCE), September 2017, https://www.osce.org/odihr/340246.

[32] 'World Report on Disability', World Teolth Organization (WHO), 2011, https://www.who.int/disabilities/world_report/2011/report/en.

[33] 'Learn More: How IFES Promotes Disability Rights', International Foundation for Electoral Systems, 2019, www.ifes.org/global-access-and-inclusion-how-ifes-partners-persons-disabilities-achieve-avoteforeveryvoice.

BARRIERS TO PEOPLE WITH DISABILITIES' PARTICIPATION IN CIVIC AND POLITICAL LIFE

Discriminatory laws and policies prevent people with intellectual disabilities from participating in political and public life.[34] It is still common across African, Asian, Latin American and Middle Eastern and North African (MENA) countries to prevent people with an intellectual disability from voting under 'unsoundness of mind' provisions.

Many built environments and transport systems are inaccessible to people with disabilities, severely restricting their mobility. Little information is available in accessible formats, allowing the communication needs of people with disabilities to go unmet. People with disabilities may be unable to access even basic products and services such as the internet, telephones and television.[35]

A lack of comparable data, disaggregated by disability, and a lack of monitoring mechanisms at national levels lead to decreased visibility for people with disabilities.[36] The lack of rigorous and comparable data on disability makes it difficult to understand fully the numbers of people with disabilities and their circumstances. This gap also means that the experiences of people with disabilities are not factored into policy and programme design.

DPOs require strengthening in order to meet the needs of people with disabilities. Partly because of the sustained exclusion experienced by people with disabilities, the capacity strengthening requirements of DPOs are sometimes greater than other CSOs, thus requiring additional resources and longer-term commitments.

Serbia
PHOTO: FEMPLATZ

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[34]'Inclusive Civic Engagement: An Information Toolkit for Families and People with Intellectual Disabilities', Inclusion International, March 2015, *www.inclusion-international.org/wp-content/uploads/2015/07/Inclusive-Civic-Engagement-Information-Toolkit.pdf*.
[35]WHO, 2011, op. cit.
[36]OSCE, September 2017, op. cit.

ACTIVITY

1. *What types of disabilities do people experience in your country or region?*

_____

_____

_____

2. *Are there differences between how people with disabilities access information and resources in your country or region? If so, what do these differences look like?*

_____

_____

_____

3. *How do the different levels of labour and time commitments experienced by people with disabilities affect their engagement with civil society?*

_____

_____

_____

4. *In your country or region, are there laws, policies and practices supporting people with disabilities? If so, are they effective? If not, why not?*

_____

_____

_____

5. *How do existing societal perceptions, beliefs and values impact on the engagement of people with disabilities with civil society?*

_____

_____

_____

6. *What services could help people with disabilities to engage more fully with civil society?*

_____

_____

_____

7. *What types of CSOs do people with disabilities mostly engage with?*

_____

_____

_____

SECTION 3
OPERATIONALISING SOCIAL INCLUSION

GenderLinks, South Africa Women from the Mavula community in Swaziland make their voices count during a debate on the equal representation of women in politics.

PHOTO: THANDOKUHLE DLAMINI

Section 3 of the toolkit guides CSO staff through undertaking a social inclusion (SI) analysis. It then turns to how staff can integrate SI considerations into their organisation's programmatic cycle and activities. The following steps will be covered:

1. Undertaking a situational analysis and data review, including mapping current initiatives, in order to prioritise key excluded groups

2. Interrogating dimensions of exclusion by utilising an intersectional analysis tool

3. Beginning to integrate findings into the programmatic cycle, including monitoring and evaluation for inclusion

An SI analysis can be undertaken when designing a specific intervention, or alternatively, as part of a comprehensive planning process such as strategic planning. The size and scope of the analysis will depend on the scale of the planning activity. It will also depend on the resources you have to commit to the process and what data is already available. For example, significant time can be saved by drawing upon research and analysis already undertaken by partners and, where applicable, member organisations.

Once an SI analysis has been undertaken, CSOs can revisit this baseline of data and analysis to inform strategic decisions and future planning.

Here are some guiding principles for undertaking an SI analysis:

• The process should be conducted in a highly participatory manner. Efforts should be made to reach out to excluded groups and to design channels for them to feed into the process meaningfully.

• Both quantitative and qualitative data should be gathered through the process as a means of gaining a comprehensive understanding of exclusion within your organisation.

• Considering the diverse contexts in which CSOs operate, it may be necessary to situate activities and translate materials into relevant languages.

Sensitisation Visit, Tanzania
PHOTO: KIJANA WAJIBIKA

SOCIAL INCLUSION ANALYSIS

We can never assume that we are aware of and understand people's experiences. Dynamics of marginalisation are often hidden and must be unpacked in order to design effective diversity and inclusion strategies. Socio-political drivers of exclusion are always in flux and therefore require active interrogation on the part of CSOs and their staff.

It is important to undertake a situational analysis to identify excluded groups involved in and affected by your work. A situational analysis will help you to establish a baseline of qualitative and quantitative data and build an overall picture of who is excluded, the barriers they face and their capacities for participation. To complete this analysis, the following steps are laid out in this section:

1. Undertake the questionnaire on the following page.
2. Review available data and, if time permits, gather further primary research with target groups.
3. Map current partners and members, including the groups they represent. Note gaps in coverage.
4. Consider external events and trends and how they impact on marginalisation in your country or region.
5. Undertake an intersectional analysis of priority groups to identify areas of exclusion and strategies for addressing them.

Note: It is worth mentioning that the above steps constitute a 'rapid approach' to a situational analysis. A list of resources has been outlined (below) that presents a range of methodologies and approaches for undertaking a more comprehensive situational analysis.

RESOURCES

Participatory Poverty Assessments (PPA) are widely used tools for including the voices of the poor in analysing and addressing poverty. An introduction to PPAs can be found here: *https://www. participatorymethods.org/sites/participatorymethods.org/files/a%20rough%20guide%20to%20 ppas_%20norton.pdf*.

ActionAid's 'Power: Elite Capture & Hidden Influence' deals with power as the source of marginalisation and provides a number of tools for analysing power and formulating strategies for collective action: *https://actionaid.org/publications/2012/power-elite-capture-and-hidden-influence-hrba-governance-resources*.

In the UK, the Department for International Development's (DFID) 'Gender and Social Exclusion Analysis Practice Paper' from 2009 provides a useful, step-by-step guide for undertaking DFID's analysis: *www.gsdrc.org/docs/open/se9.pdf*.

The Canadian Government's 'Gender-Based Analysis +' is a tool used to assess how groups of women, men and gender-diverse people may experience policies, programmes and initiatives: *www.swc-cfc.gc.ca/gba-acs/resources-ressources-en.html*.

UNDERTAKING THE QUESTIONNAIRE

Consultation among civil society is a key component in undertaking an SI analysis.

Conversations with excluded groups can help to validate findings from the data review and reveal dimensions that might not feature in official reporting.

ACTIVITY

The following activity explores key domains of exclusion, including society, the state and the market.

INSTRUCTIONS:

1. *Use the questionnaire below to guide a facilitated discussion with key civil society organisations, groups and leaders.*

2. *If time is limited, split the group into three teams, asking each of them to lead on a section of the questionnaire (one group each leads on 'Society', 'The State', 'Civil Society' and 'The Market').*

3. *Laptops with internet access should be made available to help assist groups in collecting data and information in support of their findings.*

4. *Give each group one hour to research and document their findings. Groups can then present back to the wider group.*

Note: It is worth pointing out that the following list of questions is not exhaustive. You may want to include other areas of inquiry specific to your particular context or thematic area.

DOMAIN OF EXCLUSION #1: SOCIETY

HERE ARE SOME QUESTIONS TO BEGIN YOUR ANALYSIS:

1. *In what ways do excluded groups experience poverty? What does this poverty look like? What are its impacts?*

_____

_____

_____

2. *Are excluded groups concentrated or over-represented in particular geographic areas? Do people located in these areas experience exclusion or discrimination?*

_____

_____

_____

3. **Is household labour distributed unevenly between members of households? Is this labour compensated? Who completes the majority of this labour?**

_____

_____

_____

4. **How is care work perceived and addressed? Is this work compensated? Who completes the majority of this work?**

_____

_____

_____

5. **Do excluded groups feel like they have to hide or change their identities to suit other groups?**

_____

_____

_____

6. **Are excluded groups seen as 'invisible' to other groups? Conversely, are they also seen as 'too visible' to other groups?**

_____

_____

_____

7. **Are excluded groups considered 'undeserving'? Are these groups blamed for their circumstances?**

_____

_____

_____

8. *What assumptions, perceptions and norms exist surrounding excluded groups? Are these groups denied their humanity because of these social constructs?*

_____

_____

_____

9. *In what ways do excluded groups experience stigma, prejudice and discrimination? What do these experiences look like? What are their impacts?*

_____

_____

_____

10. *Are values framed in a way of 'our values' versus 'their values', to the detriment of excluded groups?*

_____

_____

_____

DOMAIN OF EXCLUSION #2: THE STATE

HERE ARE SOME QUESTIONS TO BEGIN YOUR ANALYSIS:

1. *Are there excluded groups who are unrecognised by the state?*

_____

_____

2. *Are there excluded groups who do not or cannot register births?*

_____

_____

3. **Are excluded groups unable to access information and resources because of language barriers?**

_____

_____

_____

4. **In what ways do political systems represent the needs and voices of excluded groups?**

_____

_____

_____

5. **How equal, secure and affordable is access to justice for excluded groups? What rights and protections do justice systems offer to children?**

_____

_____

_____

6. **Do all excluded groups have access to citizenship rights? Do groups living in all geographic areas enjoy equal citizenship rights by law and in practice?**

_____

_____

_____

7. **To what extent do national laws give members of excluded groups individual, family and group rights?**

_____

_____

_____

8. *What international human rights conventions have been signed, ratified and reflected in national laws? Are there discriminatory clauses in constitutional, statutory and customary laws?*

_____

_____

_____

9. *Do excluded groups have equal access to welfare provisions distributed by the state?*

_____

_____

_____

10. *Are excluded groups the target of police or military brutality and violence?*

_____

_____

_____

11. *To what extent does the media pay a role in challenging or reinforcing existing assumptions, perceptions and norms against excluded groups?*

_____

_____

_____

DOMAIN OF EXCLUSION #3: CIVIL SOCIETY

HERE ARE SOME QUESTIONS TO BEGIN YOUR ANALYSIS:

1. *Around which issues do excluded groups mobilise? Are there particular issues that catalyse their mobilisation? Which issues?*

_____

_____

_____

2. *How extensive is excluded groups' engagement in civil society? Why is their engagement this way?*

_____

_____

_____

3. *To what extent do CSOs meet the needs of excluded groups? To what extent do they reach and represent excluded groups occupying different intersectional identities?*

_____

_____

_____

4. *Who is represented in the leadership positions of CSOs?*

_____

_____

5. *Are there strong linkages between CSOs and national organisations?*

_____

_____

_____

6. *Do CSOs want to engage in political systems or separate from them?*

_____

_____

7. *Do CSOs facilitate links between government and people in such a way that increases the voice and involvement of excluded groups?*

_____

_____

8. *Is there adequate space for CSOs to hold government accountable for the equitable delivery of services and fulfillment of human rights for all groups?*

_____

_____

9. *To what extent are privileged groups involved in the activism of excluded groups?*

_____

_____

DOMAIN OF EXCLUSION #4: THE MARKET

HERE ARE SOME QUESTIONS TO BEGIN YOUR ANALYSIS:

1. *To what extent are excluded groups able to access and own land and other resources?*

_____

_____

2. *To what extent do legal systems protect the property rights of excluded groups?*

_____

_____

3. What are the opportunities and barriers to earning an income for excluded groups?

_____

_____

4. What is the distribution of income and wage gaps within and between excluded and privileged groups?

_____

_____

5. In what ways do excluded groups experience poverty? What does this poverty look like? What are its impacts?

_____

_____

6. Does segregation in the workforce exist for excluded groups?

_____

_____

7. Are excluded groups over-represented in particular sectors of the workforce? In what ways do people working in these jobs experience exclusion, prejudice, or discrimination?

_____

_____

8. What experiences of violence do excluded groups endure in the workplace? Do they have access to recourse in the case of harm? If so, how? If not, why not?

_____

_____

9. *In what ways do private actors disproportionately and negatively impact on excluded groups? Are groups given an opportunity to consent to the actions of these actors? Do groups have access to recourse in the case of harm? If so, how? If not, why not?*

_____

_____

10. *Are excluded groups represented and heard at the decision-making tables of private actors? If so, how? If not, why not?*

_____

_____

11. *Can and do excluded groups form unions? If so, how? If not, why not?*

_____

_____

12. *How do the intersectional identities of excluded groups affect their access to financial services such as using credit, opening bank accounts, collecting payments and paying bills?*

_____

_____

13. *How do the intersectional identities of excluded groups affect their access to the market in regard to business services, customers, supplies, entrepreneurship, trading and selling?*

_____

_____

14. *What are the opportunities and barriers to migrating for work locally, nationally and internationally, as well as temporarily and permanently, for excluded groups?*

_____

_____

REVIEW AVAILABLE DATA SOURCES

Using the results gathered in the questionnaire activity, you can begin to research and build evidence surrounding key excluded groups. You can also begin to further investigate knowledge gaps in existing findings.

Consider the following sources:

- Programme and project documents from CSOs
- Research undertaken by universities and research institutions
- Statistical reports from government departments and intergovernmental organisations such as the World Bank or UN Agencies
- Consider exploring open data sources, including:
  - **Citizen-generated data:** Online maps are a good example of this type of source, including websites that empower communities to map incidences of crime and thus increase their security. Check out 'I Paid A Bribe' as an example of these websites.
  - **Government data:** Beyond official datasets such as census data, governments own unpublished data that they collect on a regular basis. Examples of this data include numbers of patients who attend particular hospitals or how many farms there are in given areas.
  - **Corporate data:** Mobile phone companies, for example, have data available on millions of people.

In this step, you may also consider engaging in a participatory approach by including partners and members in the collection and analysis of data. When data is gathered in a participatory way, research can strengthen alliances, build constituencies and strengthen capacity across your networks. Take a look at the resources in the text box for more information on participatory data collection.

MAP YOUR PARTNERS' AND MEMBERS' COVERAGE

At this point, it is useful to understand which excluded groups are already represented or actively participating in your networks and who you need to begin to reach out to.

Begin by mapping each of your partners or members, the communities and groups they work with and the scope of their coverage. Consider whether their coverage extends to various intersecting identities or if they have capacity to do so.

This process should illuminate potential gaps in your current coverage. It will make clear which excluded groups, if any, are currently represented and participating. From here, you may begin to research how to reach out to these groups.

Example mapping of partners or members:

Excluded Group	Partner Organisation	Level of Work (local, national, regional)	Key Group(s) Targeted	Programmes Targeting Group(s)	Specific Expertise
People with disabilities	The Pacific Disability Forum	National – the peak body of DPOs	All types of disabilities Women with disabilities Young people with disabilities	Research Advocacy Capacity strengthening	Monitoring implementation of the Convention on the Rights of Persons with Disabilities

CIVICUS World Assembly
PHOTO: CIVICUS

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MAP YOUR PARTNERS' AND MEMBERS' COVERAGE

Excluded groups are often targeted by repressive political parties and regimes. For example, in recent years, many European political parties have gained prominence and influence by targeting historically persecuted groups and by stoking and taking advantage of nationalist and populist backlashes to the arrival of refugees.

Consider emerging socio-political trends in your region. How do they impact on excluded groups? Are there new migration patterns, emerging populist or nationalist movements or the passing of discriminatory laws that target specific groups?

EXPLORING THE ROOT CAUSES OF EXCLUSION

At this stage in the process, you should begin to home in on a key group or key groups that have been identified as priorities for your CSO.

In order to design effective programmes for addressing exclusion, understanding the multiplicity of exclusions and the social, political, economic and cultural dynamics around them is key. On the next page, you will find an intersectional analysis tool that presents a number of domains where already excluded groups confront intersecting and multiple forms of oppression. Applying this intersectional lens will help you to gain a more comprehensive picture of an individual or group's experience.

ACTIVITY

The next step is to undertake an intersectional analysis of the excluded groups that are priorities for your CSO. This exercise will enable you to identify the social, political, economic and cultural dynamics that are specific to your country or region and that uniquely impact on the excluded group(s) at hand.

PREPARATION:
In order to undertake this analysis, convene a group of activists and organisations representing the excluded groups in question.

INSTRUCTIONS:

1. *Select an excluded group that you have identified as priority for your CSO.*

2. *Use the toolkit below to undertake a full intersectional analysis of the group. Refer back to the key questions in Section 2 to help you consider the multiple dimensions affecting their access to and engagement with civil society.*

3. *Note which areas require further research and analysis and delegate this work amongst your team.*

4. *Once you have undertaken the analysis, you can begin to consider how to integrate your findings into the design process of your programmes and activities. This step is elaborated in the next section of the toolkit.*

INTERSECTIONAL ANALYSIS TOOL

In most societies, strong cultural norms exist surrounding how people of different genders behave, the activities they undertake and the qualities they exhibit. Gender norms and beliefs are often reflected in laws, policies and practices. Further, gendered exclusion often intersects with other types of exclusion. For example, a woman with disabilities may experience multiple forms of oppression based on, first, her disability and, second, her gender.

Not all groups receive equal treatment and protection under the law. Discriminatory laws and policies often have the effect of formalising exclusion and marginalisation. For example, consider how same-sex relationships are banned in many countries or how some ethnic minorities are denied citizenship or formal recognition by the state.

Financial assets are derived from having decent employment or inherited wealth. Access to credit and social safety nets, such as social insurance and pensions, are examples of financial assets. These assets are not available to everyone, and excluded groups often lack access.

Technology provides us with unparalleled amounts of information and connection. With much of civil society organising happening online, access to technology is often a key means through which people participate. The 'digital divide' means that there is growing inequality between those who have access to information and communications technology (ICT) and those who do not. For example, consider how some groups, such as people living in remote areas and people with disabilities, are excluded from ICT. In addition, consider how these and other groups, including women and minorities, experience a heightened risk of digital security threats and attacks.

Educational attainment impacts on one's ability to participate in the labour market, including in CSOs. Political and policy processes are often overly technical and thus exclude those who do not have tertiary education. In general, excluded groups face limited access to educational opportunities.

Access to information is a fundamental prerequisite for people's participation in civil society. Information can help people to participate in priority-setting and decision-making, hold their governments accountable and demand equal treatment and equal justice. For example, consider those who cannot access information, including people with visual impairments or people who are not proficient in official languages.

Excluded people are most vulnerable to the adverse impacts of climate change. Forced migration, loss of livelihoods and increased risk of conflict are all impacts of climate change. For example, consider how subsistence farmers or those who live in countries on the frontline of the climate crisis, such as Pacific island countries, are disproportionately affected by natural disasters.

How we spend our time is often prescribed by our gender and thus by expectations surrounding our roles and responsibilities in personal and public life. For example, women undertake significantly more unpaid care work than men. Other responsibilities traditionally held by women might include physical labour, farming and other roles in the community.

Rural and regional populations generally have less access to services, poor infrastructure and higher levels of poverty. Consider also that the majority of CSO operations take place in major cities, often excluding people from rural and regional localities.

Your social status, and whether you belong to an excluded group, impacts on your capacity to decide, influence and exercise control. It can also impact on whether you can vote or run for office. For example, consider which groups currently dominate decision-making positions and who exercises voice in decisions made by states, the private sector and CSOs.

Note: *Adapted from the United States Agency for International Development's (USAID) gender analysis tool.*[37]

[37]'Integrating Gender Equality and Female Empowerment in USAID's Program Cycle', United States Agency for International Development (USAID), April 2017, *https://www.usaid.gov/sites/default/files/documents/1870/205.pdf*.

INTEGRATING SI CONSIDERATIONS INTO PROGRAMME DESIGN

The box below contains a flowchart with steps on how to overcome barriers and obstacles through the process of programme design. While this example is focused on women's empowerment, these three steps can be applied to any excluded group that you are working with. Complete the below activity with your team and apply these steps to your programmes and activities.

IDENTIFY OBSTACLES TO WOMEN'S PARTICIPATION BASED ON THEIR INTERSECTIONAL IDENTITIES AND EXPERIENCES

Women may…

…be busy with other responsibilities.

…fear what their partner or male relatives will think if they talk to strangers.

…experience direct prejudice or discrimination that prevents them from speaking up.

…have internalised the belief that they are 'second class citizens'.

Strategise to overcome these obstacles.

Take advantage of meeting spaces where women are already together and might feel comfortable speaking.

Make special efforts to identify women with leadership skills or leadership potential and find spaces to work with them.

Use codes to initiate discussion when personal questions are too difficult.

In mixed groups, call out/in people when they make remarks that inhibit women's participation.

Focus on small gains to build confidence.

Reach, engage and empower women.

Identify and honour their intersectional identities and experiences.

Understand what women do in a day.

Identify and work with the support systems that women can count on.

Generate a comfortable atmosphere and sense of shared experience to encourage participation.

Ensure that women play a role in designing, implementing and evaluating activities.

Help women inspect their situation and be prepared to provide information and support as needed.

ACTIVITY

In the previous intersectionality activity, you identified some of the barriers to participation experienced by excluded group(s) working with your CSO. Return to this work, noting the obstacles to engaging these groups in your programmes/activities.

Next, begin to strategise on how to overcome these obstacles. When reaching out to excluded groups, consider the following questions: What is the best mode of communication for them? Do they have access to the internet? Where does this group generally meet? What existing organisations do they participate in? What socio-cultural barriers will you need to navigate?

It might take some time before you achieve the next step of 'empowerment'. For now, consider where you want to get to with this group. Would they be interested in formal membership of your CSO? Would they want to co-create a campaign? Once you have determined their long-term objectives, you can begin to identify next steps in getting there.

CIVICUS Citizen Cafe
PHOTO: CIVICUS

NOW, HERE ARE SOME KEY CONSIDERATIONS AND QUESTIONS YOU CAN ASK YOURSELF ACROSS EACH STAGE OF THE PROGRAMME CYCLE.

SCOPE PROGRAMME

Scoping should be undertaken with the intersectional identities of your target group in mind, ensuring that there is space for not just 'go-to' organisations but also those who are not typically represented.

How does this programme intersect with the concerns or issues of the excluded group(s) identified?

How would not involving this excluded group(s) negatively impact on lives? What are some of the inadvertent consequences of their exclusion?

DESIGN PROGRAMME

Widen the scope of your programme to address specific issues experienced by the identified excluded group(s).

Consult with organisations and movements familiar with the context and able to make recommendations on programme design.

Define objectives and outcomes that go beyond representation. If you have a theory of change, it should directly address how the programme will help to end exclusionary practices at either the social, cultural, or political level.

Conduct a robust risk analysis to ensure that planned activities do not inadvertently harm the identified excluded group(s). Can activities be modified to reduce this risk?

IMPLEMENT PROGRAMME

Partner directly with grassroots organisations and movements to deliver programme.

Provide technical support and funding directly to organisations and movements, acknowledging that years of marginalisation may require additional support to strengthen capacity.

Build in opportunities to support organisations' and movements' advocacy that addresses the root causes of marginalisation.

MONITOR AND EVALUATE PROGRAMME

Consultation with key organisations and movements should take place throughout the lifecycle of the programme to monitor ongoing impact.

Adopt a range of methods to measure change at the individual level (i.e. increased voice and capacity to influence change) and the systems level (i.e. changes to policies or regulations), utilising both qualitative and quantitative data.

Data should be disaggregated by age, gender, ethnicity and other areas relevant to the programme.

AN ILLUSTRATIVE PROGRAMME ON STRENGTHENING LGBTQI+ VOICES AND ORGANISATIONS:

PROGRAMME DESIGN PHASE

Inclusion of diverse LGBTQI+ organisations and movements in initial consultations

Baseline data collection around key issues identified through consultation process

Data validated by organisations and movements and key issues and themes identified

Co-design of programmatic objectives and theory of change

PROGRAMMATIC OBJECTIVES AND ACTIONS IDENTIFIED

Objective 1: *Strengthen capacity of LGBTQI+ leaders and CSOs*

Objective 2: *Train LGBTQI+ leaders to participate effectively in democratic processes and run organisations*

Action 1: *Complete comprehensive mapping of all existing LGBTQI+ organisations and actors, encompassing a full diversity of sexual and gender identities*

Action 2: *Launch grants programme aimed at enhancing sustainability of LGBTQI+ movements and organisations*

Action 3: *Include LGBTQI+ leaders and groups in programmes for strengthening civil society*

Action 4: *Engage in capacity strengthening activities with LGBTQI+ organisations to enhance advocacy at national and regional levels*

Action 5: *Support cross-movement collaboration through joint CSO advocacy initiatives*

Action 6: *Support formation of national and regional LGBTQI+ networks and coalitions*

Action 7: *Advocate toward donors and philanthropists to fund LGBTQI+ organisations and movements directly*

ILLUSTRATIVE INDICATORS

Number of LGBTQI+ groups actively involved in civil society

Number of LGBTQI+ groups with full membership in select civil society coalitions and platforms

Number of LGBTQI+ leaders and organisations trained in advocacy skills

Number of policy changes as a result of LGBTQI+ national- and regional-level advocacy

Number of new LGBTQI+ groups in formation or formally registered throughout the country

Number of new LGBTQI+ groups that are financially sustainable

Number of new grants announced targeting LGBTQI+ groups

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Note: *Adapted from USAID's toolkit for integrating LGBTQI+ rights activities into programming.*[39]

See the Swedish International Development Cooperation Agency's 'LGBT Global Development Partnership' factsheet.[40]

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[39]'Toolkit for Integrating LGBT Rights Activities into Programming in the E&E Region', USAID, September 2014, *https://www.humanitarianlibrary.org/sites/default/files/2020/08/LGBT%20Toolkit%20092414.pdf*.

[40]'The LGBTI Global Development Partnership', Swedish International Development Cooperation Agency, *https://www.sida.se/globalassets/global/nyheter/lgbti-global-development-partnership-fact-sheet_final_160622.pdf*.

MEASURING FOR INCLUSION
A NOTE ABOUT DISAGGREGATED DATA

Disaggregation is the collection and presentation of data on specific groups and areas of exclusion, including gender, disability, geographic location and more.

Collecting and analysing disaggregated data can be a powerful tool to take an in-depth, comparative look at inequalities, across groups, time and place. While it is increasingly common to see sex-disaggregated data, since the launch of the Sustainable Development Goals (SDGs) in 2015, there has been a greater push to collect data disaggregated by income, gender, age, race, ethnicity, migratory status, disability, geographic location and other characteristics relevant in national contexts.

Below is a summary of data disaggregation required across SDG 1 (no poverty), SDG 2 (zero hunger) and SDG 3 (good health and wellbeing).

Target number	SDG1				SDG2			SDG3						
	1.1	1.2	1.3	1.b	2.1	2.2	2.3	3.1	3.2	3.3	3.5	3.7	3.8	3.a
Age		x	x	x	x	x			x	x	x	x		x
Sex		x	x		x	x		x	x		x			
Employment			x											
Poverty levels				x	x								x	
Disability			x											
Vulnerable population									x				x	
Indigenous status							x							
Rural/Urban	x													

Note: Analysis undertaken by the International Institute for Sustainable Development.[41]

CIVICUS Youth Assembly. Civil Society and Global Decision-Making.
PHOTO: CIVICUS

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[41]'Disaggregated Data is Essential to Leave No One Behind', International Institute for Sustainable Development, October 2017, www.iisd.org/blog/disaggregated-data-essential-leave-no-one-behind.

MOVING BEYOND QUANTITATIVE MEASURES

While quantitative data is important for measuring progress in identifying and addressing inequalities, organisational policies, processes and practices—measures that are not necessarily quantifiable—are equally important for tracking and promoting inclusion.

1. Rethink diversity quotas: Even if they are well-intentioned, diversity quotas can lead to tokenisation. In fact, many organisations have achieved success by doing away with quotas altogether, instead focusing on company-wide inclusion efforts that better support individuals and groups with diverse needs and experiences.

2. Create safe(r) spaces: Safe(r) spaces are exactly what they sound like. They are designated places where people can feel secure, comfortable and cared for. These spaces include gender-neutral bathrooms, lactation rooms, prayer and meditation spaces and quiet zones for overstimulated or introverted workers. Practices like making programming wheelchair-accessible, installing multilingual signage and including gender pronouns in e-mail signatures are examples of ways to create safe(r) spaces.

3. Establish a culture of continuous feedback: Feedback meetings help to build trust and open dialogue. The opportunity to honestly share feedback is fundamental to making excluded individuals and groups feel heard and valued. Engagement tools can range from anonymous feedback mechanisms to one-to-one interviews, all of which is meant to capture individual and group perspectives and identify opportunities for improvement.

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**CIVICUS Youth Assembly.
The Impact of Youth-CSO Relations.**
PHOTO: CIVICUS

ACTIVITY

Think of an existing programme or activity at your CSO that you consider to be insensitive to SI considerations. The programme or activity that you select should demonstrate some relevance for excluded group(s) that your CSO wants to reach out to. Now, work through the following questions:

1. *How does this programme or activity intersect with the experiences and challenges of the group(s) in question?*

_____

_____

2. *How could this programme or activity's current insensitivities to SI considerations potentially cause harm to the group(s) identified?*

_____

_____

3. *What opportunities exist to include this group(s) into the existing programme or activity?*

_____

_____

4. *How could this programme or activity contribute to achieving positive change for this group, such as addressing discriminatory laws, policies, or practices?*

_____

_____

5. *What are some risks of involving this group in your programme or activity?*

_____

_____

6. *How would you go about getting this group on board with your programme or activity? Do you foresee any barriers, and if so, what are they?*

_____

_____

Pilot Programme on Diversity & Inclusion, Lubumbashi, Democratic
Republic of the Congo Radio show on introducing D&I concepts
PHOTO: YOUNG PROFESSIONALS FOR AGRICULTURAL DEVELOPMENT –
DEMOCRATIC REPUBLIC OF THE CONGO

SECTION 4
EMBEDDING SOCIAL INCLUSION

The final section introduces a range of strategies for embedding SI considerations into organisational cultures.

Embedding SI into the institutional culture of an organisation is a long-term endeavour. It requires leadership, significant human and financial resources and sustained commitment. Adopting a strategic approach to SI means shifting from ad hoc practice to work that is truly transformative, having the potential to shift power structures and systems that perpetuate exclusion.

The following topics will be covered in Section 4:

• Key areas of commitment

• A sample assessment tool for identifying where attention is needed

• A resource list for further development and ongoing learning

An SI analysis can be undertaken when designing a specific intervention, or alternatively, as part of a comprehensive planning process such as strategic planning. The size and scope of the analysis will depend on the scale of the planning activity. It will also depend on the resources you have to commit to the process and what data is already available. For example, significant time can be saved by drawing upon research and analysis already undertaken by partners and, where applicable, member organisations.

KEY AREAS OF COMMITMENT

Here are some commitments required for embedding SI into the work of your CSO.

AREAS OF COMMITMENT	REQUIREMENTS FOR COMMITMENT
Leadership	The members of the leadership team are visible champions of SI.
	SI champions have been appointed to drive reforms at the operational level.
	The composition of the leadership team and governing bodies are representative of the excluded groups that the CSO is targeting.
Strategic Thinking	A long-term vision of where the CSO should be in five or 10 years has been agreed, and these goals are included in strategic plans.
	An SI working group has been appointed to drive implementation and hold leadership accountable.
Resources	Resources have been committed to SI reforms, both human and operational. SI is built into all programmatic budgets.
	Resources are committed toward building the SI capacity of members and partners (including private partners).
Accountability	SI goals are clearly communicated in strategic documents and online, as well as to all member organisations and donors.
	Transparent mechanisms are in place to measure progress against strategic goals.
	Individuals who abuse power are held accountable, with mechanisms in place to deal with cases of discrimination.

SI ASSESSMENT TOOL

The following SI assessment tool is intended as a 'health check' to assess where your CSO stands in its progress with SI and to illuminate possible priority areas moving forward.

This assessment tool can be completed in a participatory manner with key staff or those who have a good understanding of organisational policies and processes (including HR staff). Alternatively, relevant sections of this assessment can be adapted and used as a survey for circulation among staff and members. This assessment can also be completed confidentially.

MEASURE	YES	NO
There are positive discrimination policies that promote the recruitment of excluded groups to leadership positions in the CSO.		
Progress on inclusion initiatives is regularly reported to the CSO's members and partners, particularly those that represent excluded groups.		
SI is included in job descriptions, with the majority of senior management having clear deliverables around SI.		
There is an action plan or other directive that articulates SI priorities for the CSO, supported by monitoring and evaluation frameworks and reporting guidelines.		
SI is a standing item in all senior management team meetings, with each team leader reporting on progress made against strategic plans.		
A steering committee has been formed to track progress against strategic plans.		
Leaders allocate the necessary resources required to achieve SI outcomes.		
Elders and community leaders and representatives are invited to participate in planning meetings.		
The CSO regularly updates data regarding inclusion, access, equity and discrimination in target communities and tracks incidents and mounting threats to excluded groups.		
There are adequate resources in place to ensure that inclusion strategies are fully implemented.		
Managers 'walk the talk' by seeking out opportunities to integrate SI considerations into daily operations and leading their teams to do the same.		
Capacity strengthening and training on SI is mandatory for all staff and member organisations.		
Grievance and redressal mechanisms are in place, with special mechanisms for handling sexual harassment. Discrimination issues are publicised across the CSO.		
The CSO strives to ensure that its communication assets reach diverse audiences (for example, it uses the languages of excluded groups, text messaging to reach rural audiences, or radio for people with literacy challenges or visual impairments).		
Excluded voices are systematically included in consultation and civic processes.		
The CSO invests in establishing strong relationships with groups and organisations that are representative of excluded groups.		
The CSO advocates for SI considerations in its partnerships with the private sector and other actors outside of civil society.		
Data is disaggregated by age, gender, location, disability and other intersections.		
Data is disaggregated by key groups including age/gender/location/disability and other key groups.		

Note: *Inspired and adapted from WASH Alliance International's 'Inclusion Assessment Tool'.*[42]

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[42]Organisation Inclusion Assessment Tool', WASH Alliance International, October 2016, *www.wash-alliance.org/social-inclusion*.

Once you have completed the above assessment, key actions can be shaped around those areas where you answered 'no'. Recognising that integrating SI considerations into your work is a long-term process, identify realistic and achievable measures that are an obvious next step for your CSO.

Possible next steps might include:

- Holding a dialogue with excluded groups to identify priority measures
- Identifying organisational champions to help steer SI work forward
- Establishing an official position on and vision for SI
- Beginning to integrate SI messaging and inclusive language on your CSO's website and other marketing assets

ADDITIONAL SI RESOURCES

SOCIAL INCLUSION RESOURCES

- 'Municipal Evaluation Tool: Measuring Inclusion', Alberta Urban Municipalities Association, https://www.auma.ca/sites/default/files/Advocacy/Programs_Initiatives/WIC/auma_met_august_25_2014_0.pdf

- 'Human Development Report 2016: Human Development for Everyone', UN Development Programme, March 2017, www.undp.org/content/undp/en/home/librarypage/hdr/2016-human-development-report

- 'A Common Framework for Gender Equality and Social Inclusion', Gender Equality and Social Inclusion Working Group, Nepal and International Development Partners Group, Nepal, 2017, https://asiapacific.unwomen.org/en/digital-library/publications/2017/04/gesi-framework

- 'Gender and Social Exclusion Analysis', DFID, March 2009, www.gsdrc.org/docs/open/se9.pdf

GENDER RESOURCES

- 'Gender and Inclusion Toolbox: Participatory Research in Climate Change and Agriculture', Consultative Group on International Agricultural Research Program on Climate Change, Agriculture and Food Security, World Agroforestry Centre and CARE International, 2014, https://cgspace.cgiar.org/bitstream/handle/10568/45955/CCAFS_Gender_Toolbox.pdf

- 'Power, Inclusion and Rights-Based Approaches: The ActionAid Gender Equality and RBA Resource Kit', ActionAid, 2006, https://actionaid.org/publications/2006/gender-equality-resource-kit#downloads

- The Gender Audit Handbook: A Tool for Organizational Self-Assessment and Transformation', InterAction, 2010, https://www.interaction.org/wp-content/uploads/2019/03/Gender-Audit-Handbook-2010-Copy.pdf

DISABILITY RESOURCES

- Toolkit on Disability for Africa', UNDESA, November 2016, *https://www.un.org/development/desa/dspd/2016/11/toolkit-on-disability-for-africa-2/#:~:text=A%20Toolkit%20on%20Disability%20for,African%20context%20and%20aims%20to%3A&text=Offer%20examples%20of%20good%20practices%20from%20many%20countries%20in%20the%20African%20region*

- 'Persons with Disabilities and Ensuring their Right to Participate in Political and Public Life', Organization for Security and Co-operation in Europe, 2017, *www.osce.org/odihr/340246?download=true*

- 'Disability Inclusive Development Toolkit', Christian Blind Mission, 2017, *www.cbm.org/article/downloads/54741/CBM-DID-TOOLKIT-accessible.pdf*

MIGRATION AND REFUGEES RESOURCES

- 'Diversity, Dialogue and Sharing...', United Nations Educational, Scientific and Cultural Organization (UNESCO), 2017, *www.en.unesco.org/interculturaldialogue/resourcesOECD*

- 'Making Integration Work: Refugees and Others in Need of Protection', UNESCO, January 2016, *http://www.www.oecd-ilibrary.org/social-issues-migration-health/making-integration-work-humanitarian-migrants_9789264251236-en*

LGBTQI+ RESOURCES

- 'Promoting the Enjoyment of All Human Rights by Lesbian, Gay, Bisexual and Transgender People', The Council of the European Union, October 2010, *www.ec.europa.eu/europeaid/sites/devco/files/toolkit_.pdf*

- 'The Sustainable Development Goals and LGBT Inclusion', Stonewall International, *https://www.stonewall.org.uk/system/files/sdg-guide.pdf*

- 'Toolkit for Integrating LGBT Rights Activities into Programming in the E&E Region', USAID, September 2014, *https://www.humanitarianlibrary.org/sites/default/files/2020/08/LGBT%20Toolkit%20092414.pdf*

- 'LGBT+ Inclusion in International Development Programming: A Checklist for UK Aid Connect Proposals,' Bond, September 2017, *https://www.bond.org.uk/resources/lgbt-inclusion-in-international-development-programming*

OTHER RESOURCES

- 'Global Agreements, Grassroots Advocacy: Youth and Governance in a Post-2015 World', Restless Development, ActionAid and Plan International, *https://developmenteducation.ie/media/documents/Global%20agreements%20grassroots%20advocacy%20toolkit.pdf*

- 'Youth Civic Engagement', UNDESA, 2016, *https://www.un.org/development/desa/youth/wp-content/uploads/sites/21/2018/12/un_world_youth_report_youth_civic_engagement.pdf*

- 'Girls on the Move: Adolescent Girls and Migration in the Developing World', Population Council, 2013, *www.popcouncil.org/uploads/pdfs/2013PGY_GirlsOnTheMove.pdf*

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