What is «gender»?

Gender is a socially constructed definition of women and men. It is not the same as sex (biological characteristics of women and men) and it is not the same as women. Gender is determined by the conception of tasks, functions and roles attributed to women and men in society and in public and private life.

Women as well as men shape gender roles and norms through their activities and reproduce them by conforming to expectations. Men as well as women can promote changes in gender relations. Gender relations are reproduced not only between but also amongst women and men (e.g. mother/daughter, father/son).

What are key characteristics of «gender relations»?

Unlike biological characteristics of women and men, **gender relations are context-specific**. They vary between and within countries (e.g. rural/urban regions), but also between households. Often, households present different patterns of male-female relations depending on their structure e.g. if they are women-headed, nuclear or extended. Because women and men interact in all aspects of life, gender relations are omnipresent in the private sphere (i.e. household level) as well as the public sphere where women and men interact as community members or colleagues.

Gender relations are not static. Even in traditional cultures, gender relations change as a result of economic, legal, political or environmental conditions. Some changes are intentional and positive in terms of gender equality – for instance, many countries have taken steps in laws to eradicate gender discrimination. Deliberate steps can also be taken to maintain/increase gender inequality (e.g. in Saoudi Arabia, women are not allowed to drive). Changes can be negative for equality as in some countries of the ex-USSR where unemployment amongst men is high as a result of market liberalisation policies. Without their traditional role and status as household heads and breadwinners, an increasing number of men resort to domestic violence to express their malaise and reclaim their masculinity. But changes can also be positive. There are many women working in export processing zones, including traditional cultures such as Bangladesh. Their recruitment has nothing to do with women's empowerment as all to do with economic viability. However, whilst working conditions in these factories is questionable, there is growing evidence that women can improve their status in the household as a result of the financial contribution. Changes in gender relations can be slow or sudden. For in Rwanda, women acquired new roles and responsibilities «overnight» after many men were killed in the 1994 genocide.

What are «gender relations»?

In most contexts, women and men (girls and boys) play different roles at a household, community and societal level. To perform their roles, they need different resources (natural, economic, political, social). Often however, women or men cannot play the roles they want and/or access the resources they need because of their gender. Women in particular face difficulties accessing and controlling resources and their social and economic contributions are often undervalued.

To «identify gender relations» is to look at the attribution and organisation of roles, responsibilities, resources and values attached to women and men in order to assess the differences and inequalities between them and to map out their specific interests, opportunities, constraints and needs in development.

DEFINITIONS

Gender relations interact with other social relations. Not all women and all men are the same: Age, class, ethnicity, religion, sexual orientation and ability (physical and mental) influence women's and men's activities and responsibilities, as well as their status, opportunities and constraints in life. Individuals carry multiple identities. In different circumstances, one identity may prevail over others. In India, a high caste woman may have more power than a low-caste man, but she may still be subordinated to men in her own caste. However, rich or poor, young or old, muslim or catholic, «people» are always women or men, meaning that gender is an unavoidable relation. For instance, many conflicts are currently fought on ethnic or religious grounds, but women and men are undeniably affected and involved in these conflicts in different ways.

Gender relations are power relations. Institutions in private (e.g. the family, marriage) and public spheres (e.g. religion, school, labour market) reflect and maintain gender relations. Therefore, attempts to change them to improve gender equality are often perceived as threats to «traditions» and culture. Gains towards gender equality may be difficult to achieve, but they can easily be lost. There are many examples of societies calling for a return to traditional values, including the subordination of women, when they feel «threatened» by external forces or ideas. Traditional gender relations, where women's status is inferior to men's, are often flagged up as a symbol of cultural identity.

What does «gender equality» mean?

Gender equality is the aim of Gender and Development. It does not simply or necessarily mean equal numbers of women and men (girls and boys) in development activities, nor does it necessarily mean treating women and men (girls and boys) exactly the same. The aim is not that women and men become the same, but that their opportunities and life chances become and remain equal. Gender equality includes the right for women and men to be different. It signifies an aspiration to work towards a society in which women and men (girls and boys) are able to live equally fulfilling lives and to equally contribute to designing the society they want.

What does «mainstreaming gender» mean?

Mainstreaming gender is a strategy to achieve gender equality. It means recognising that women and men often have different needs and priorities, face different constraints, have different aspirations and contribute to development in different ways. A key hypothesis is that organisations and societies must be transformed to accommodate women's and men's needs and treat them as equals. For instance, in 1997, with the victory of the Labour Government, the number of women parliamentarians in the UK increased significantly. Soon after they were elected, a group of women MPs lobbied to change the working habits of the Parliament (e.g. all night sessions) to be able to reconcile their professional and family life.

Mainstreaming implies that actors and institutions normally involved in development are able to incorporate a gender equality perspective in the way they work (their institutional culture, competence etc.), as well as in all their policies and programmes, at all levels and at all stages of their planning cycle.

What does «integrating gender as a transversal theme» mean?

Working with gender as a transversal theme is one of the strategies for mainstreaming gender. It is a planning methodology. At a programme/project and sector level, it implies that before decisions are taken, an analysis is made of the effects on women and men respectively. It requires the participation of women as well as men throughout the planning cycle and the systematic integration of their respective priorities and needs.
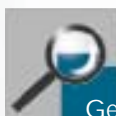
Gender relations are intrinsic to all aspects of life. Whatever our age, religion, ethnicity, class etc. we are always either a woman or a man, with the limitations and opportunities that are associated with it in a particular context.

What are the gender stakes?

Partnership is the cornerstone of SDC approach to development. SDC institutional policy and commitments constitute an important leverage in any context. But ultimately, it is the commitment of partners at all levels that holds the key to gender mainstreaming.

A dialogue between SDC and its institutional partners is therefore essential to identify why and what gender issues matter (see sheet 3) in a particular context. Defining the gender stakes is critical for the identification of programmes that are relevant to both women and men in the concerned groups and owned by all stakeholders (sheets 7, 10).

In this process, the views of women and men at all levels are valued and seen as complementary.

Three approaches can be combined to mainstream gender in programmes and projects. There is no prescription or receipe. The good strategy is the most relevant, efficient and sustainable in terms of gender equality in a particular context. The minimum requirement is to integrate gender as a transversal theme in all planning phases and processes. Then, following the context (women and men's needs, partners' capacity and priorities, local dynamics etc.), gender specific programmes and/or measures to institutionalise gender in organisations are implemented as complementary strategies to reinforce gender as a transversal theme.
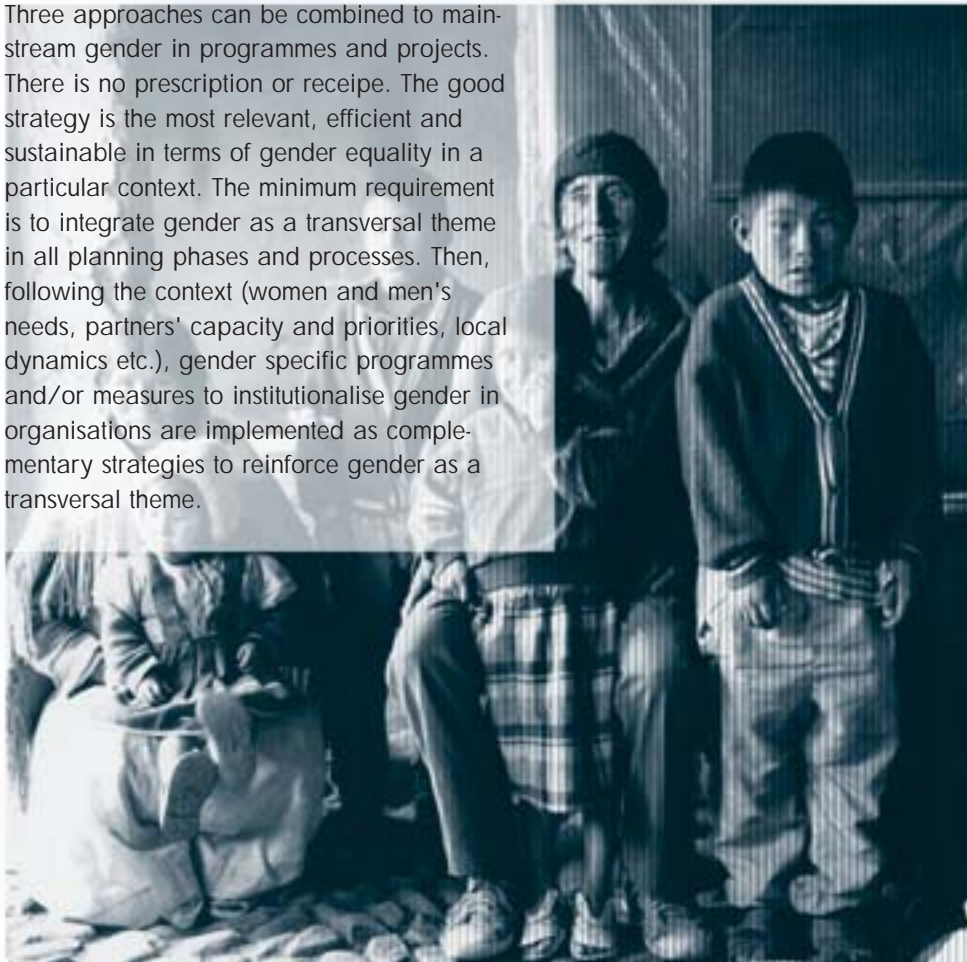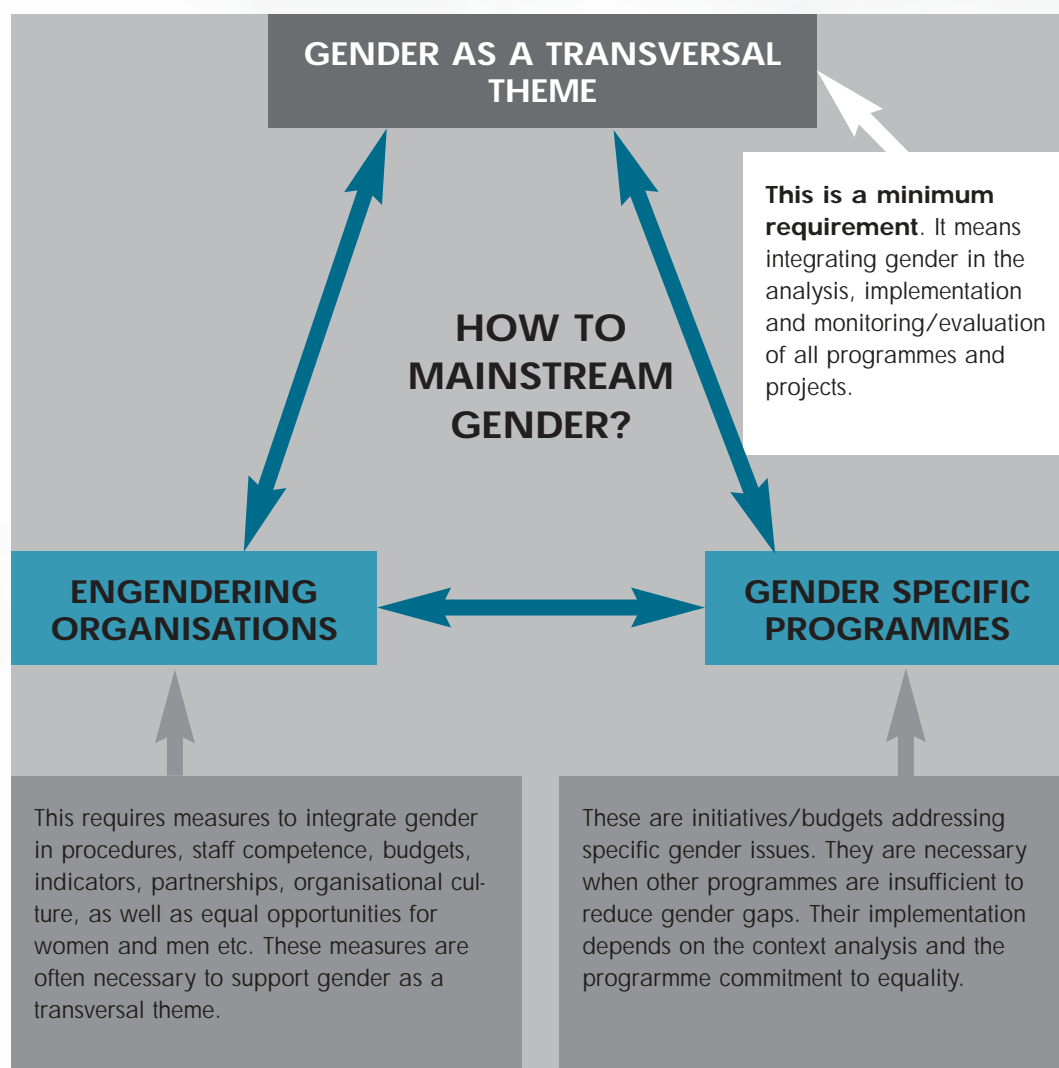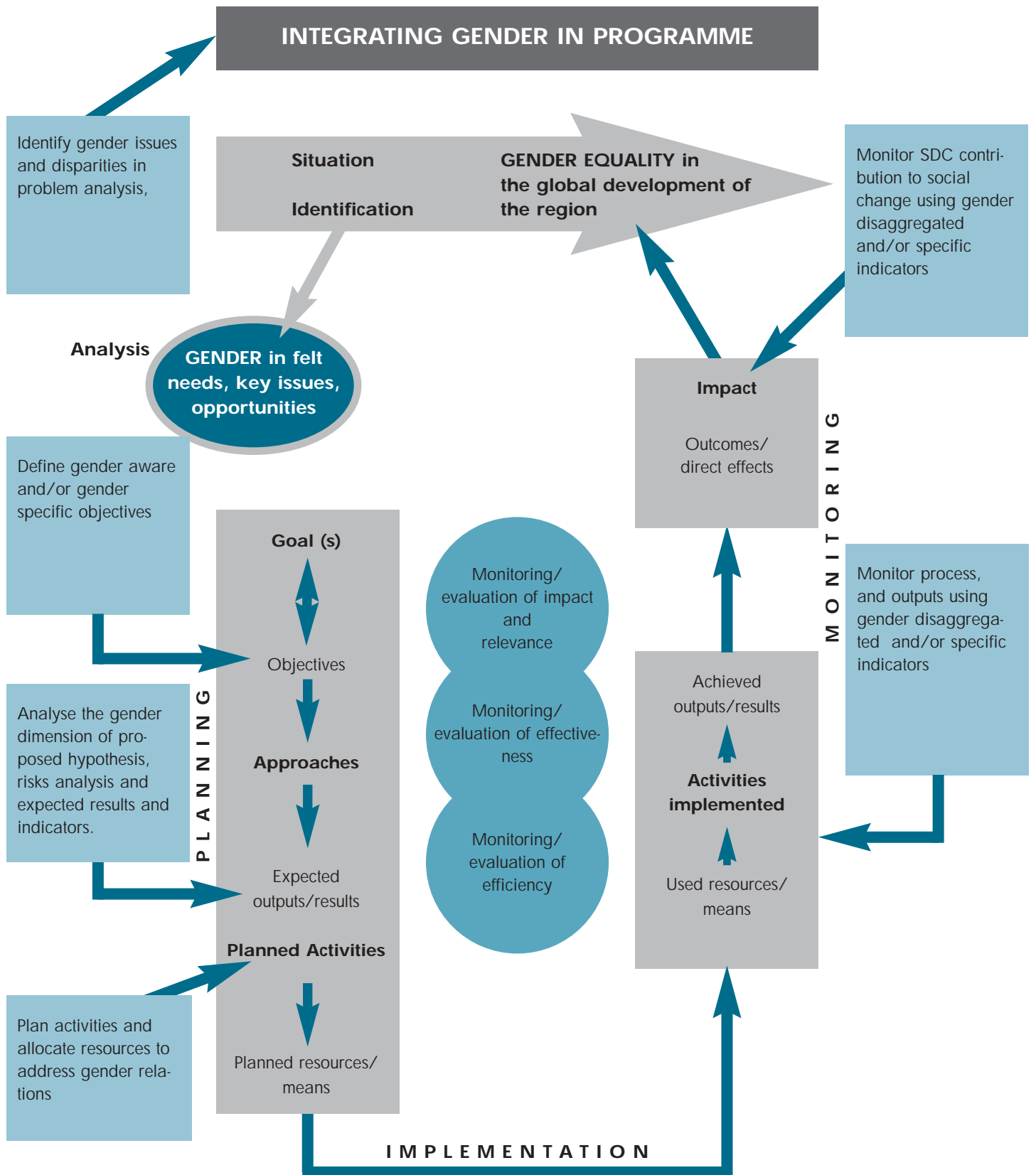
INTEGRATING GENDER AS A TRANSVERSAL THEME

Objectives and approach

Integrating gender as a transversal theme is a planning approach, a methodology. It consists in engendering all steps and processes of the Project or Programme Cycle Management (PCM). This approach increases the relevance, effectiveness and efficiency of interventions as it brings the respective needs of women and men to the heart of planning.

At different steps of the cycle, questions are asked to ensure that the processes and results integrate gender needs (see diagram below). Particular care is taken to ensure that gender does not evaporate between different phases and to translate the result of gender analysis into gender-aware programming. This requires that SDC and its partners are committed to equality and have gender-aware mechanisms, skills and tools to do this (see sheets 7, 11).

GENDER AS A TRANSVERSAL THEME

This is a minimum requirement. It means integrating gender in the analysis, implementation and monitoring/evaluation of all programmes and projects.

HOW TO MAINSTREAM GENDER?

ENGENDERING ORGANISATIONS

GENDER SPECIFIC PROGRAMMES

This requires measures to integrate gender in procedures, staff competence, budgets, indicators, partnerships, organisational culture, as well as equal opportunities for women and men etc. These measures are often necessary to support gender as a transversal theme.

These are initiatives/budgets addressing specific gender issues. They are necessary when other programmes are insufficient to reduce gender gaps. Their implementation depends on the context analysis and the programme commitment to equality.

INTEGRATING GENDER IN PROGRAMME

Identify gender issues and disparities in problem analysis,

Situation

Identification

GENDER EQUALITY in the global development of the region

Monitor SDC contri-bution to social change using gender disaggregated and/or specific indicators

Analysis

GENDER in felt needs, key issues, opportunities

Define gender aware and/or gender specific objectives

Impact

Outcomes/ direct effects

M O N I T O R I N G

Monitor process, and outputs using gender disaggrega-ted and/or specific indicators

P L A N N I N G

Goal (s)

Objectives

Monitoring/ evaluation of impact and relevance

Analyse the gender dimension of pro-posed hypothesis, risks analysis and expected results and indicators.

Approaches

Monitoring/ evaluation of effective-ness

Achieved outputs/results

Expected outputs/results

Monitoring/ evaluation of efficiency

Activities implemented

Planned Activities

Plan activities and allocate resources to address gender rela-tions

Planned resources/ means

Used resources/ means

I M P L E M E N T A T I O N

Key questions to integrate gender as a transversal theme

In analysis/planning process...

■ Are women as well as men (target groups, staff, partners) involved in the initial situation analysis at all levels (e.g. policy dialogue, community consultation)?

■ Are organisations working specifically on gender, or with women consulted?

■ Is qualitative and quantitative data disaggregated between women/men?

■ Are gender stakes relevant to the programme/project/sector clearly highlighted?

■ Are women/men's constraints, needs and views reflected in the objectives, risk analysis and impact hypothesis of the intervention?

■ Is the allocation of financial and human resources appropriate to address equality issues?

■ Are key processes (e.g. dialogue between key stakeholders), procedures (e.g. Terms of Reference) and planning tools (e.g. logframe) explicit on gender?

■ When participatory, are the processes and approaches participatory for everybody?

In implementation ...

■ Do women and men participate in the programme including decision-making?

■ Does the programme have strategies to involve women as well as men?

■ Do women and men have equitable access and control over programme resources - e.g. are there criteria that discriminate against women or men?

■ Is the programme steered with a view to increasing women and men's equal benefits?

In monitoring ...

■ Do women and men (target groups, SDC staff, partners) take part in monitoring?

■ Are collected data on the immediate and/or longer-term effects of the programme disaggregated for women and men?

■ Are changes in gender relations reported as part of monitoring?

■ Are «best – and bad – practice» on gender mainstreaming analysed and disseminated?

Measures to integrate gender as a transversal in the ATICA agricultural project (Bolivia)

1. Municipal plans are approved in the Women's Assemblies to ensure that their demands are included as well as men's,

2. Women's specific demands are integrated in the projects (e.g. family gardens on «reclaimed land»),

3. Women's as well as men's perspectives are included in the formulation of peasants' hypotheses (the effects they wish to achieve with the project). For instance, this process highlighted that children going to school is a measure of success for women, whilst for men success is increasing the surface of their arable lands.

GENDER SPECIFIC PROGRAMMES

Objective and approach

Sometimes, integrating gender as a transversal theme in general programmes is not sufficient to address disparities and specific programmes are needed to positively affect equality between women and men.

Gender specific programmes are implemented at a macro or at meso level. They can be sector specific (e.g. reducing the enrolment gap between girls and boys in education) or thematic (e.g. violence against women). Increasingly, gender issues are addressed as part of human rights and good governance programmes. HIV/AIDS and environmental programmes often require gender specific actions.

A key factor to achieving gender equality is women's empowerment, in particular their participation in decision-making in formal as well as informal political structures. Gender specific programmes strategically change inequality factors and create the conditions for women to become the agents of their own development. For instance, they can:

- Build women's awareness of their own situation (e.g. their rights)
- Promote women's decision-making at home, in community and society
- Reform legal frameworks (e.g. review family codes to integrate gender equality)
- Sensitise men to accept women as equal partners (e.g. in political processes)

Gender specific programmes are not the only way to address gender inequality. They should not substitute themselves to sectoral programmes with gender as a transversal theme. They should not be confused with Women In Development type of projects (see below). They should be considered as short-term measures. In the long term, women's/girls' needs and gender issues should be taken care as part of mainstream interventions, once critical disparities are addressed.

In Tanzania, gender is a transversal theme in rural and health programmes, but there is a gender specific programme in defence of women's strategic interests. In Niger too, all programmes are expected to tackle women's practical needs whilst a time-bound gender specific programme is implemented to address their strategic needs. In Benin, the lack of female cadres gave impulsion to a «compensatory» programme to help women obtain university degrees and get involved in development

Who to target: Women and/or men?

Gender specific programmes do not automatically or exclusively target women. Experience has shown that to improve the situation of women (girls), it is often necessary to involve men too. Working with men to change their gender relation to women but also to themselves (e.g. challenging their own assumptions of masculinity) is essential for the promotion of gender balanced development.

Gender specific programmes can also support institutions that deal with women/gender strategic issues, such as National machineries, NGO or networks.

What is the difference between women's projects and gender specific programmes?
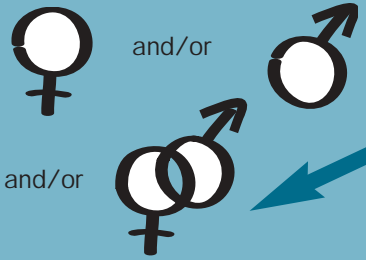
During the UN decade for Women (1976 – 1985), the Women in Development approach (WID) tried to provide answers to women's needs in all sectors (e.g. reproductive health, income generation, agriculture, violence against women and women's political representation etc.). However, with limited resources and support, WID rapidly became a sector of its own, whilst sectoral policies and programmes continued in a gender-blind way, only occasionally targeting women as a «vulnerable» group – alongside «children, the old, the disabled, the unemployed etc.» – in special programmes and projects.

The Gender and Development (GAD) approach tackles power relations between men and women and not only considers women's problems. It aims to get gender equality issues out of their isolation (e.g. gender equality machineries, women's projects etc.) to involve all actors concerned in building a balanced society and to promote gender equality in all interventions and sectors.

Key differences between Women's projects and Gender Specific programmes:

- Gender specific programmes are based on a analysis of gender relations, whereas women's projects tend to focus only on the situation of women;
- Gender specific programmes target women and/or men to address equality, whereas women's projects only target women;
- Gender specific programmes measure changes on relations between women and men, not only on women.

Planning Steps	WID	GAD
Analysis	Women as main unit of analysis	Gender relations as **transversal** theme in analysis, in all sectors
Implementation	Objectives, strategies, activities and resources target women only	and/or ... and/or ... Objectives, strategies, activities and resources target either women and/or men
Monitoring and evaluation	Indicators measure changes in the situation of women only	Gender disaggregated data measure relative changes in the situation of women and men and (in)equality as a **transversal theme in all sectors**.

Required at the beginning of all interventions

Women or/and men in sectoral and/or specific gender programmes: a strategic choice

Required at the end of all interventions

INSTITUTIONALISE GENDER IN ORGANISATIONS

Internalisation of gender at a project/programme level takes consistent attention and support to ensure that gender sensitivity exists at all levels. Too quickly, the accent is on women, without reasoning from a gender perspective. The situation of female staff (e.g. household and childcare duties) requires special attention especially if fieldwork is a major task. The challenge lies in translating concepts into practical approaches on a field level. *SDC India Annual Programme, 2002*

It is often necessary to develop capacity, procedures and mechanisms to work with gender. The institutionalisation of gender in organisations supports the integration of gender as a transversal theme. For more on «Gender and organisations», see sheet 9a.

GENDER APPROACHES

HINTS TO DEVELOP GENDER STRATEGIES?

■ Develop a dialogue around gender within and between SDC and its partners around four key questions:
1. What «gender» processes and results do we want to achieve?
2. How do we want to achieve these processes and results?
3. To what impact on gender equality do we want to contribute?
4. What contextual factors influence gender equality in our context?

■ Discuss SDC new gender policy (2003) with partners, its relevance to national development/gender issues, policies and priorities.

■ Create a «space» for staff to exchange and reflect on gender. Internal forums – multi sectoral or thematic – prove very efficient to build staff confidence and competence on gender.

■ Develop competence in a specific gender workshop or as part of a general workshop (e.g. on PCM or monitoring). Training is often a good catalyst.

■ Integrate gender issues in self-evaluation or evaluation processes.

■ Assess the Country programme and/or key programmes to see if and how gender is taken on board. A gender expert can be called upon if no expertise is available internally.

■ Carry out an organisational analysis to assess the integration of gender in key tools, procedures, organisational culture and identify the awareness and needs of staff.

■ Formalise the gender strategy objectives and processes in a document and clarify the commitments, contributions and roles of different stakeholders in mainstreaming.

Gender mainstreaming strategy for SDC – Macedonia, 2001(key points)
■ Develop relevant gender criteria and sector level gender objectives for individual projects and priority sectors;
■ Involve all partners in the «gender dialogue»;
■ Develop gender competence of local partners;
■ Explore potentials for collaboration identified through the gender assessment, including networks and gender resources;
■ Integrate gender into staff and programme development activities;
■ Ensure resources for gender work, and engender existing budgets;
■ Establish a gender-aware monitoring system for the Country program.

Integrating gender as a transversal theme in all interventions is a minimum requirement. Implementing gender specific programmes and institutionalising gender in organisations are complementary strategies to mainstreaming gender in development.
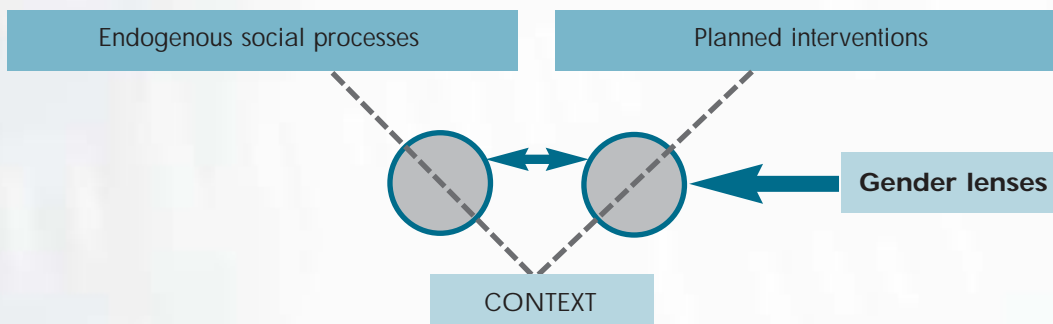
GENDER ANALYSIS

Why gender analysis?

Experience shows that some interventions do not reach their objectives because they have not taken enough account of social relations, including gender, in their context.

A gender analysis is essential to understand local dynamics (problems, opportunities, values), plan interventions that are relevant and beneficial to both women and men and assess the different benefits/inconveniences of programmes on women and men. In particular, it is necessary to test hypotheses and assumptions that SDC and its partners unavoidably bring with them because of their ideology, experience, and their approach to and expectations of development. For instance ...

■ In many programmes, the participation of target groups is a key assumption. It is assumed that target groups will contribute in terms of ideas, labour/time and, increasingly, money (cost sharing). Women and men's ability to participate (time availability, skills, decision-making, financial affordability etc.) and the impact of gender on participation is not systematically assessed, which can affect both the relevance and efficiency of the programme.

■ Many interventions aim to reduce the reproductive workload of women (e.g. water collection) so that they have more time for productive activities and/or self-development (e.g. literacy). But women do not always control their time and income. In this case, a gender analysis is needed to assess whether the reduction of women's workload is efficient, or sufficient, to empower them.

Like any situation analysis, a gender analysis is concerned with two «scenes»: the local scene where endogenous social processes take place and the development scene, which concerns development programmes and projects. «Gender lenses» are used to analyse both scenes.

Endogenous social processes	Planned interventions

Gender lenses

CONTEXT

Integrating gender in the situation analysis is one of the key principles included in SDC Gender Policy (2003).

1. Endogenous social processes: The analysis focuses on *the local scene.* It identifies what women and men do and how, their respective needs/opportunities as well as the gender relations and their possible imbalance. It finds out how traditions, as well as economic and social changes/problems, affect women and men in different social groups. Depending on needs, the analysis may focus on:

   ■ Households and communities (sheet 5)
   ■ Specific sectors (sheet 6)
   ■ National policies (sheet 6)
   ■ The country at large (sheet 6)
   ■ Development actors/organisations (sheets 9a, 10)

2. Planned interventions: The analysis focuses on *the development scene.* It examines women's and men's participation in development programmes, including those which are supported by SDC and its partners, and assesses:

   ■ To what extent, how and why programmes, respond to women's and men's respective gender needs (sheet 8)
   ■ SDC and partners as organisations (sheets 9, 10, 13)
   ■ The effects of SDC interventions on gender (sheet 12)

«Traditional diagnoses are not appropriate. Diagnosis must relate to the needs of the project and the use of anthropological techniques (informal interviews, direct observation, key informants etc.) should result in the production of «local images», reflecting that not all communities and users, women and men are the same. It is then possible to capture heterogeneity (not only women/men differences) and allows a deeper and closer knowledge of concrete reality».
SDC Coordination for the Latin America Programme, 2000

What to analyse?

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

The range of development and gender issues that can be addressed in a situation analysis is very wide. To ensure the relevance of the collected information and give the analysis a realistic scope, SDC and its key partners ask themselves:

«What do we need to know to ensure that policy, programme and project planning addresses the needs of women and men (girls and boys) and benefits both women and men (girls and boys)?»

At a second level, sub-questions can help focus the analysis on specific target groups:

- Who may benefit directly from the programme resources?
- Who may be concerned or affected by the programme activities, directly or indirectly?
- Who may participate in and contribute to the programme?
- Who may be involved in decision-making in the programme?
- Who may find it difficult to participate/make decisions in the programme?

Not all women and not all men are the same. The analysis reflects the social diversity of the groups researched. This implies that answers to the question «who» are systematically disaggregated between different groups of women and men (girls and boys) in terms of income group, age, religion etc, as relevant in a given context. However, the precise sex disaggregated data and gender analytical information needed depends on the sector and the context.

GENDER ANALYSIS

«There are significant disparities reflecting diversity along ethnic, religious, income and age groupings. For some groups of Albanian women, for instance, although protective and non-discriminatory legislation exists, customary practice results in them not claiming their rights – e.g. in inheritance. For groups of rural women from Roma, Turkish and Albanian communities, there is the widespread practice of women not freely exercising their right to vote. There are also indications of early marriages, multiple pregnancies and school leaving among young women in these communities».
Macedonia gender assessment, 2001

How to proceed with gender analysis?

There are three pre-requisites for the integration of gender in an analysis:

- A dialogue between SDC and its partners to define the stakes and the focus
- Gender-aware analytical frameworks and programming tools (sheet 4)
- A gender aware and competent team (internal staff and/or external expertise)

Two approaches are possible, which are not mutually exclusive.

1. Integrate gender as a transversal theme in a traditional analysis

Whenever possible, gender is integrated as a part of country, sectoral, community etc. analyses. All methods of data collection (e.g. community and household surveys, participatory research, stakeholders analysis) are adapted to better integrate gender. Keeping in mind the «must know» questions (sheets 5 and 6 – analysis at micro/macro level), those in charge of the analysis (SDC, partners, consultants) need to:

- Clearly request gender disaggregated information (qualitative and quantitative) in Terms of Reference and be specific about the gender information that is needed;

- Revisit the analytical framework to adjust «old» questions or indicators with a gender perspective and/or create new gender specific ones (sheets 4, 5, 6);

- Ensure the participation of different groups of women and men in the consultation (according to age, income, different household structures etc., as relevant) and facilitate the free expression of their respective needs (e.g. talk to women and men separately).;

- Include women and men in the research team so as to facilitate access to both women and men in the groups targeted in the analysis;

- Include gender experts (women or men) in the team. Gender experts may need to work with and/or train sectoral/programme research teams if they are not yet gender competent. It takes time to gain gender reflex.

Because gender is a cross cutting issue, the results of a specific gender analysis are used for programming in any sector, and not exclusively to plan gender specific programmes

2. Conduct a separate gender analysis

At times, it is necessary to carry out a specific gender analysis to complete a prior diagnostic and/or when specific gender data is needed for a particular geographical area, sector, or programme. A specific gender analysis is essential before implementing gender specific programmes. Local or international gender specialists may be hired, but competence is increasingly available locally amongst partners and SDC staff.

The integration of gender issues and the disaggregation of information along gender lines is a pre-requisite for all programmes and projects. Gender aware analysis at household, community, country or sectoral level makes a key contribution to the relevance, efficiency, effectiveness and sustainability of development interventions.

Which analytical framework?

Different analytical frameworks are now available on the «market» (see list) and are very useful to inspire thinking. They can be applied to review endogenous social processes (the local scene) as well as planned interventions (the development scene). Ultimately, gender frameworks are most useful when they are developed to suit a particular context and local dynamics[1].

All analytical frameworks, in one form or another, try to establish:

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

[1] A number of SDC programmes have also created their own analytical frameworks, for example Niger and India.

The gender division of labour: identifying gender roles

The first question to answer is «who does what»? The participation of women and men in each of the four roles must be analysed qualitatively as well as quantitatively. The analysis of the gender division of labour using «gender roles» is the starting point of virtually all gender analysis. Because not all women and not all men are the same, it is necessary to disaggregate the «who» between women and men in their diversity (age, class, religion, ethnicity etc.), **as relevant in the context.**

The **reproductive role** includes activities that take place mainly at household level, such as domestic chores, caring for youth and old people, looking after the health of house-hold members, their education, etc. These activities are unpaid because they are seen as «natural». The world over, women are more involved than men in the reproductive role.

The **productive role** refers to activities of women and men that produce economic resources, in cash or kind. In many contexts, women work at home and their productive work is invisible (e.g. doing piecework for factories from home) Subsistence farming or contribution to cash crop farming, in which many women are involved, is a productive task. In many contexts, men are involved in more remunerative and formal forms of work than women.

The **community-managing role** refers to voluntary activities at community level to ensure the provision and maintenance of collective resources and infrastructures (e.g. water points, roads, health services). Women are very involved in this role because deficient public goods and services affect them in the first place. Yet, they often have less access to decision-making than men.

The **constituency-based politics role** includes political and advocacy activities at community, local, national and/or international levels, within traditional structures (e.g. village headship), party politics and/or civil society. Women's and men's participation in this role is strongly influenced by their class, educa-tion, age, ethnicity etc. In most contexts, men dominate political leadership, except in women's organisations.

Women's and men's access to and control over resources

To complement the gender division of labour, the analysis must identify what resources are relevant in each role, for example:

In the reproductive role, tangible resources are food, money, housing, clothing, clean water, transport e.g. to attend a clinic, information e.g. about social services. Intangible resources include (health, education, reproductive rights, time, social networks).

In the productive role, tangible resources include land, equipment, credit, raw materials, transport. Intangible resources are skills and knowledge, mobility, the right to work, to control one's income, access to economic markets and networks and information etc.

In the community-managing role, access to information and decision-making are critical. Time is a key resource as «participation» consumes time that women and men could otherwise spend on reproductive or productive activities.

In the political role, key resources are information, political education, rights (e.g. to participate in public debate, be candidates for elections, vote), physical mobility and self-confidence. Political and civic rights are key resources for human rights and good governance.

The analysis of resources within the existing gender division of labour identifies:

■ Resources that women and/or men need to play their existing gender role(s): They can be tangible or intangible, endogenous or brought in by programmes/projects. Their use may be common or specific to women and men. When resources are scarce, different groups of users may be in conflict.

■ Factors that influence women's and men's access to and control over endogenous as well as programme resources

(availability/scarcity, affordability, right to). Factors influencing access to and control over endogenous resources can be cultural. In the case of programmes, procedures can be influencing factors (e.g. if micro credit can only be accessed by those with collaterals such as land, access is difficult for women).

■ Strategies used by women and men to access/control resources and potential conflicts of interest between women and men.

■ Changes that should take place in the level/conditions of access and control over some resources to allow women or men to engage into new roles they have chosen.

Points to remember

■ (Most resources can be classified as need or benefit. For instance, money may be a need in the productive role (capital), and a benefit (income earned). In programmes, it is also useful to distinguish between resources (inputs) and benefits (outputs).

■ (The distinction between access to and control over resources is critical in the analysis. The continuum between the two is not automatic and often requires some level of empowerment for those excluded from decision-making.

In Niger, women have access to land but they do not control the fields their husbands lend them. Men can claim their land back, particularly if they have been improved by the women's work. Therefore, women do not invest too much as they know that they can be evicted from their plot any time. This situation affects productivity and farming outputs.

Women's and men's gender needs

The analysis of the gender division of labour and of women's and men's access and control over resources must lead to the identification of women's and men's gender needs.

- When women and/or men demand more access to some resources/opportunities to perform their existing gender roles better, they express a Practical Gender Need . Their demand does not aim to challenge the customary gender division of labour.

- When women and/or men want to challenge the customary gender division of labour and power relations and when they wish to fight factors that create gender inequalities, they express a Strategic Gender Need.

More programmes/projects respond to practical gender needs because they are easier to diagnose than strategic ones. They also create less resistance because they do not directly challenge gender-based power relations. Practical gender needs are often perceived as social and identified in sectors such as health or water and sanitation. In these sectors it is mainly women (and children) who are most visible as primary users of e.g. water or services. However, where gender is associated with and limited to «the social», linkages with power and the political can be overlooked.

Addressing practical or strategic gender needs?

There is no right answer as it is the context and the programme's objectives that orient the strategies. Sometimes, it is necessary to meet a practical need first (e.g. construction of a clinic) to later on fulfil a strategic need (women's and men's shared control of the clinic). Other times, strategic needs are given priority, for instance when access to land (strategic need) is indispensable for women and men to increase their farming outputs and income (practical need). Strategic needs are strongly linked to decision-making and empowerment. Because of their low level of participation in politics, women cannot promote their practical needs (e.g. better health, competence). Gender specific programmes are appropriate to tackle women's strategic needs.

It is for the women and men in a specific context to define their priority gender needs. Women and men may not always agree on what these are. Age, income level, religion etc., not only gender, may influence how women and men prioritise their gender needs.

In Mali, as in Madagascar, decentralisation provides a flagrant example of the gender exclusion logic. Women are less involved than men in the identification of needs at local level and very few are elected to municipal councils (strategic need). As a result, local development plans do not reflect their practical needs appropriately. In particular, women's need for capacity building, information and credit are given limited priority compared to infrastructures (schools, roads, markets…). The exclusion logic continues as women are less involved in the management of community resources brought by decentralisation. In Mali, the political education of women is addressed in a gender specific programme.

GENDER ANALYTICAL FRAMEWORK

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

Gender inequalities and needs

What gender inequalities and needs are expressed in each role, by women/men?

What gender inequalities and needs are not so easily expressed by women/men?

What inequalities/needs are directly linked to the programme/project (e.g. accessibility criteria)?

What inequalities/needs are context-specific (e.g. cultural values, traditions etc.)?

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

This framework can be used with sheets 5 and 6 for gender analysis at different levels and also with sheets 7 and 8 for planning at different levels (eg. to define indicators, bench marks). It can also be combined with sheet 11 to monitor programme outcomes and assess change in target groups.
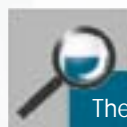
The use of basic gender tools makes it possible to analyse the gender division of labour, women's and men's access and control over resources and decision-making and their respective needs and interests in any given context. It is crucial to obtain this information before planning any programme or project.

GENDER IN HOUSEHOLD AND COMMUNITY ANALYSIS

Why analyse gender at household and community level?

Gender analysis at household and community level is essential, as this is where women and men «live» and experience the effects, positive and negative, of development (see gender analysis sheet 3).

Gender equity is also considered as one of the main values that form the basis of the SDC programme. It is a guiding principle of the country programme 2003-2007 and priorities for the coming years are identified. For example gender analysis to be undertaken for all programme components and gender disaggregated performance indicators to be determined and monitored.

Yet, many development programmes make assumptions about the way women and men live at household and community level. They do not sufficiently take into account the fact that women and men have different roles, responsibilities, rights/power, resources and needs. The lack of knowledge of livelihoods and needs of women and men in target groups is a key factor in the failure of programmes and projects. Collecting gender aware data collection at micro level is essential to constitute baselines and assess change overtime.

GENDER IN HOUSEHOLD AND COMMUNITY ANALYSIS

What to analyse?

The general aim is of course to identify key issues at micro level in different sectors (e.g. education or vocational training) or processes (e.g. decentralisation). It is to map out local dynamics and actors working at that level to influence or address problems. All this should be done using gender lenses. The two-scene analytical framework (see sheet 3) can be used.

The starting point is to answer the question: «what information is useful to help design and run programmes and projects?». If the analysis is carried out at the very beginning of an intervention, the focus cannot be narrowed down too much as researchers cannot define a priori that some information will not be useful. Alas, gender issues are often excluded through this process.

Reciprocal impact?

Endogenous social processes   Planned interventions

Household level

Community level

CONTEXT
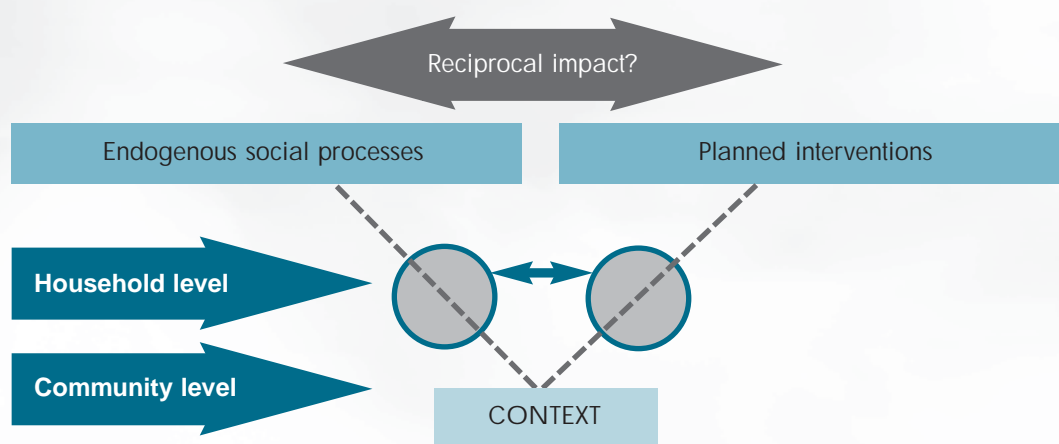
In the northern part of Madagascar, an NGO identified a good market for egg-plants, squash and pumpkins and proposed a gardening project to local women. Women were to receive land from their husbands to start the production. A year later, despite the promising market, women had done little and had received no support from men. A further round of investigation on the part of the NGO revealed that in that part of the island, these crops are believed to create male infertility, thus explaining the reluctant attitude of both women and men.

How private is the household?

Traditionally, micro level analysis has had an *anthropological* approach, implying that researchers/planners have no right to question/challenge the organisation of roles and powers in the private sphere. They can only describe it. What happens at household level, and to a lesser extent at community level in terms of gender, is often protected by the «cultural argument». However, there is no doubt that the household is political.

Gender relations in the private sphere have an impact on the public sphere (the community, the workplace, society at large). Over the years, many issues have confirmed this and the need to consider household-based gender issues as development issues in their own right. A few examples from different countries:

- Gender bias in the distribution of food leads to higher mortality of girls and/or to nutritional deficiency in pregnant women.
- Unequal decision-making power over sexual rights between women and men contributes to the HIV/AIDS pandemics.
- Domestic violence against women contravenes human rights as well as affecting victims' physical and mental ability to work and perform in society.
- Women's lack of control of financial resources affects the success of their micro enterprises and credits get used up by men.
- Household domestic habits/needs (e.g. cooking, sanitation) affect the environment and public health (water contamination).

Of course, macro policies and interventions in the public sphere also impact gender relations at household and community level. In some countries ...

- The privatisation of health services has increased prices and reduced the number of women attending ante natal clinics.
- One-child policy (China) leads to high infanticide of girls.
- The construction of roads has led to better access to work and markets for women and men, but also to migration and family dislocation (more female headed households).
- In some cases, new roads led to the commercialisation of agricultural produce being taken over from local women by male intermediaries with better access to transport, information and capital.

GENDER IN HOUSEHOLD AND COMMUNITY ANALYSIS

How to gather the information?

1. From the start, it is important to include gender in the definition of the focus of the analysis. This means both:

■ Involving women and men (policy makers, professionals, community workers, community leaders etc.)

■ Involving staff (women and/or men) from organisations working on gender/women issues

2. It is essential to review existing research methods and frameworks (e.g. PRA, household surveys, community profiles etc.) to engender them (sheet 3) using gender tools and indicators.

3. Potential obstacles to women's and men's participation in the analysis must be pre-identified e.g:

■ Can women speak openly in public?

■ Are women likely to talk freely in a mixed group?

■ Is it desirable to run separate discussion groups for women/men, and/or different groups of women/men (e.g subgroups by age)?

■ Are women and men likely to be available at the same time for the consultation?

■ If doing a household survey, when are both women/men likely to be at home?

■ If planning a public meeting, when are women/men most likely to attend?

■ If travel is needed to attend the meeting, will women as well as men come?

■ If only «leaders» are invited to the meeting, how gender representative will it be?

■ If the place selected for the meeting is associated with men, or women, may it affect a gender-balanced participation?

■ Are communication channels chosen to invite women and men to participate in the consultation gender aware?

■ Etc.

  These questions can be applied to ensure the participation of women and men both from target groups **and** development organisations in the analysis.

4. Based on this gender-aware preparatory work, the teams must plan strategies to ensure that women and men will be able to express themselves freely on what they experience and perceive as their gender needs and what they think are key gender issues and inequalities to address in their context.

5. Household and community analysis can take time and resources (financial and human too). There is often a temptation to short circuit the process to go to the «essential», i.e. planning, and/or to put more emphasis on programme/project analysis (sheets 8, 9). Yet, micro analysis, particularly if it follows a participatory approach, is a key process in empowerment as it encourages women and men to work through their problems (individually and/or collectively), provokes self-reflection and creates ownerships of objectives and strategies.

As this process also raises issues of (gender) power at household and community level, it may also create conflicts of interests that may require mediation/negotiation between different community groups, including between women and men. But it can also offer a space for dialogue.

In the Gaya region of Niger, women had a tradition of cultivating and commercialising the shoots of palm trees (called mirichi) as a delicacy. A DDC agricultural project for women succeeded in increasing the mirichi production. Local markets soon became saturated and the transport of mirichi to distant markets had to be organised. Rapidly, richer men took over the mirichi market from the women as only they had access to transport and capital to buy in large quantities.

Thanks to a project designed for the management of a forest producing wood for the city of Bamako, mechanical equipment was brought in to facilitate large-scale forest exploitation. Right from the start, the project discussion partners were exclusively men. When the project was set up and a forest management committee was put in place, it too was uniquely composed of men. Only during the on-site visit of a gender expert did people realise that women had been exploiting the forest for a good ten years with only their arms and legs as equipment. Despite the markedly lower productivity which was registered, not only did they already have a management committee, but a solidarity fund as well. With the implementation of the project, the structure put in place by the women became obsolete, and the women were reduced to simple labourers.

GENDER IN HOUSEHOLD AND COMMUNITY ANALYSIS

«Must have» gender information at household level (see analytical tools sheet 4)

- What reproductive tasks do women and men have in different household structures (e.g. female headed, nuclear, polygamous, extended)?

- What productive roles do women and men have? What benefits do they get?

- How do women and men use their time and resources (in different roles/tasks)?

- What do women and men contribute (value attached to contributions)?

- What resources are accessed and controlled (decision-making) by women/men?

- What factors (culture/traditions, laws) influence gender at household level?

- How do gender relations improve/constrain individuals' and household welfare?

- What would women/men like to change in gender relations at household level?

- What are women's/men's priorities for change?

«Must have» gender information at community level (see sheet 4)

- What initiatives target gender needs (what needs? practical and/or strategic)?

- How do women and men participate in local activities/projects?

- What roles are they fulfilling?

- Who is involved in making decisions?

- What community/development resources can women/men have access to?

- Which are controlled by women/men?

- What benefits do women/men gain from these development initiatives?

- What factors (culture/traditions, laws) influence women's and men's participation and gender relations at community level?

- How do gender relations improve/constrain community welfare?

- What would women/men like to change in gender relations at community level?

- What are women's/men's priorities for change?

- How do local development actors (women and men) perceive and work with «gender»?

GENDER IN COUNTRY, POLICY AND SECTOR ANALYSIS

Why gender in country analysis?

A gender-aware analysis of the national context, including policies, development sectors and actors is critical to mainstream gender in programmes and projects.

A country analysis provides a social, economic, cultural and political profile where the respective roles, contributions and needs of women and men are thoroughly described and analysed. The link between gender inequalities and other factors affecting development must be made to inform planning (see sheet 7: gender in country programme). This analysis is important to help SDC confirm or identify partners and alliances that are useful to promote gender equality.

How?

A two scene-framework is useful for this analysis (see sheet 3).

National scene	Cooperation scene

Focus on gender and/in …

▸ Key sectors and poverty
▸ Decision-making
▸ Culture/traditions
▸ Economic/social processes
▸ Laws/policies
▸ Local actors/institutions

COUNTRY

Focus on gender and/in

▸ Donors initiatives
▸ SDC initiatives
▸ Partner/ships
▸ Resources
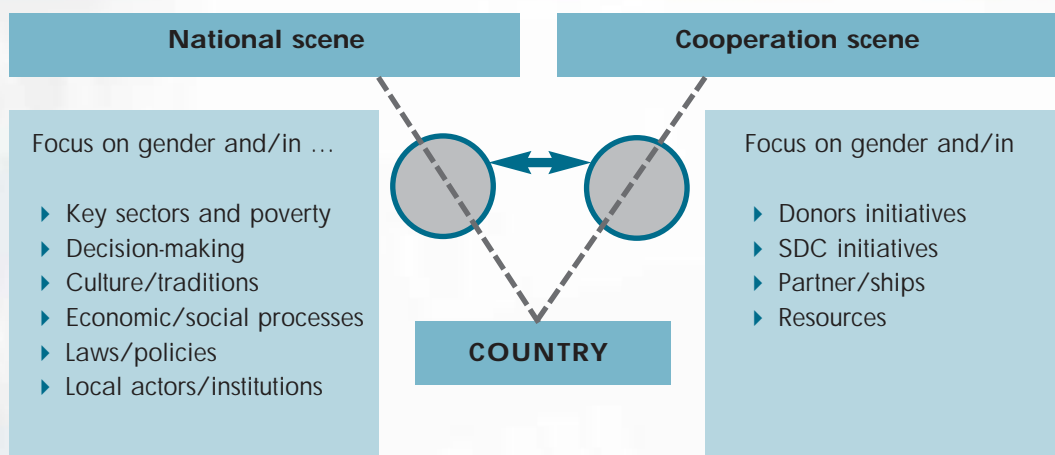
Before starting the gender-aware country analysis, the following are in place:

■ A gender-aware analytical framework
■ Basic gender disaggregated gender data in the targeted area/sector
■ A gender competent, and, whenever possible, gender-balanced team
■ A list of key interlocutors/respondents with a knowledge of gender issues

GENDER IN COUNTRY, POLICY AND SECTOR ANALYSIS

Gender machinery: A key player at national level
The Women's World Conference in Beijing in 1995 reinforced the idea that national mechanisms are needed in each country to catalyse and supervise the process of mainstreaming gender equality. In most countries, there is a Ministry, Department or Bureau for Gender Equality, or for the Promotion of Women as it is often called. The political strength and the capacity (human and financial) of these national mechanisms vary greatly from country to country, and within one country, from Government to Government. However, the world over, national gender mechanisms tend to be under-resourced and politically weak. Yet, they are a key actor in the search for gender equality.

The work of national mechanisms is usually framed by a «national gender policy» and/ or supported by an action plan for gender. Increasingly, Gender Focal Points are in place in key line ministries to assist the implementation of gender across sectors.

At country level, the analysis tries to identify major trends (economic, social, political, environmental etc.) shaping the context and SDC main sectors of interventions. Trends affecting gender relations are included, inasmuch as they represent a threat or an opportunity for equality between women and men.

«Externally enforced political repositioning has polarised modernist from traditionalist sectors in society. A first and major loser is the gender factor: It is becoming increasingly difficult for women and girl oriented empowerment programmes to function without threats».
Pakistan Annual Programme, 2002

It is important not to reinvent the wheel and to make the most of existing sources of information on gender. Of course, original research is not excluded and is particularly useful to identify qualitative gender issues that tend to be underanalysed.

All original research should involve women and men at all relevant levels as part of the consultation process. All this information is used to write up the «context» section of the Country Programme. All sections of the Country Programme must be gender-aware (see sheet 7).

There are two options to obtain a gender-aware view of a country's situation:
1. Gender is integrated as a transversal in a «general» country analysis
2. A specific gender profile (country, sector) is carried out (sheet 3) if other relevant diagnoses are incomplete in terms of gender.

Often, basic gender-disaggregated data (on health, education, political participation) already exist in the country (e.g. national statistics, UNDP human development report). In addition, a wide range of information on gender in development sectors in many different countries/regions is now available on the Internet and often has the merit of being qualitative as well as quantitative.

GENDER IN COUNTRY, POLICY AND SECTOR ANALYSIS

Must have gender information in a country analysis

The national scene
- Participation and roles (qualitative/quantitative) of women's/men's in key (and SDC) sectors
- Women's/men's participation in decision-making at national level
- Gender and poverty (quantitative and qualitative data)
- Cultural practices/beliefs, customs affecting gender equality (positive/negative)
- Economic and social changes affecting gender equality (positive/negative)
- Key changes in gender relations (positive/negative) over the last 5 – 10 years
- Gender in macro (e.g. PRSP) and sector policies
- Gender specific policies/laws – objectives and means
- Local actors/institutions (government and civil society) and initiatives for gender

The Cooperation Scene
- Donors' initiatives to support gender equality
- Main results, difficulties met by these initiatives so far
- SDC past initiatives, difficulties and achievements to promote gender (see sheet 7)
- Commitment, experience, and competence of SDC current partners on gender
- Resources (human, institutional, financial) available to promote gender
- Potential for alliances
(See sheet 11 for monitoring indicators at country level and list for internet sources)

In Burkina Faso, the complexion of the cottage industry sector exhibits enormous disparities in function with the gender dimension. Women's professions are held in low esteem by society, which perceives a craftsman as a person vested with the status of a professional, while the craftswoman is first and foremost to be considered as a mother or as a wife, engaging in a secondary type of activity to earn money for subsistence needs.

Gender in a sector or thematic analysis

Policy makers and actors in social sectors (e.g. health, governance, environment, rural development) tend to be more responsive to gender than those involved in economic/ macro issues (e.g. transport, infrastructures). Yet, these issues matter to gender too. In addition, it is now obvious that economic and institutional issues (e.g. structural adjustment, privatisation, trade liberalisation or reform of the state) have a different impact on women and men.

However, local partners, particularly NGO and women's organisations are becoming more vocal in demanding a dialogue on gender with donors in «hard» sectors too. Sector wide approaches (SWAPs) and decentralisation are already offering new opportunities and challenges for SDC to work with new actors and create new synergies and alliances for gender.

GENDER IN COUNTRY, POLICY AND SECTOR ANALYSIS

Must have gender information in a sector analysis

- Qualitative/quantitative data on the participation/decision-making of women and men
- Disaggregated data on the resources that women and men have access to (e.g. skills, credit, information, legal protection etc.) and the benefits they obtain (e.g. income, status, information)
- Gender imbalances in access to and control over resources and benefits
- Institutional as well as cultural factors influencing gender in the sector
- Treatment of gender in sector policy framework
- Actors/institutions in the sector **and** those promoting gender equality in the sector
- Initiatives by national machinery (e.g. Women's Ministry) in this sector
- Changes (economic, legal etc.) in the sector and effects on gender
- SDC past experience in the sector and lessons concerning gender
- Role/choice of current/future partners to promote gender

Key questions to integrate gender in policy analysis

1. *Has the policy formulation process been gender sensitive* (gender in dialogue with key actors and policy-makers, dialogue with national gender machinery and women/gender organisations, participation of women and men «beneficiaries»)?

2. *Are objectives of the policy gender-sensitive* (based on gender-disaggregated data and gender stakes, existence of gender specific objectives, inclusion of gender in assumptions/risks and impact hypothesis, capacity of proposed partners on gender)?

3. *Are strategies relevant to women and men* (use of gender lessons from the past, of arguments/documentation to illustrate gender issues/gaps, allocation of budgets and resources)?

4. *Is the policy implementation and monitoring gender sensitive?* (Commitment of policy makers, institutional changes to support gender, use of gender-balanced budgets, to measure policy impact on gender equality (sheet 11)?

Policy analysis (by sector and or general e.g. Poverty Reduction Strategies Papers) is part of country level analysis.

Integrating gender in country analysis – including sectors, policies and stake holder's analysis – contributes to the recognition of women's and men's needs as part and parcel of national development issues and can influence the development agenda at the highest levels of decision-making.

GENDER IN COUNTRY PROGRAMMES

Ultimately, it is a matter for SDC and its partners to decide how, how far and how fast they can proceed with gender, keeping their policies, objectives and resources in mind.

Why integrate gender in Country Programmes?

Very often, the context analysis in Country Programmes doesn't consider gender issues: In general, «women situations» rather than «gender relations» are observed and assessed. Not all key data are gender disaggregated and gender data are more available in some sectors (social) than others (economic). There is limited analysis of development actors' and partners' commitment and competence towards gender equality.

Of course, this has a direct impact on Country Programmes, and subsequently on individual programmes and projects. When initial analysis are not gender aware, working hypotheses, risks and objectives cannot reflect the gender needs of women and men. Monitoring is affected too. How to monitor changes on women/men and in gender relations, when there is no baseline? A limited analysis of partners' capacity also makes it difficult to plan and monitor institutional change. Ultimately, it is the overall relevance, effectiveness, efficiency and sustainability of Country Programmes that is affected.

In the Kyrgyz Republic, a workshop was held to assess the integration of gender in the projects implemented by SDC NGO partners. This led to the identification of key problems and potentials and of short to medium term solutions to be considered in the next Country Programme.

GENDER IN COUNTRY PROGRAMMES
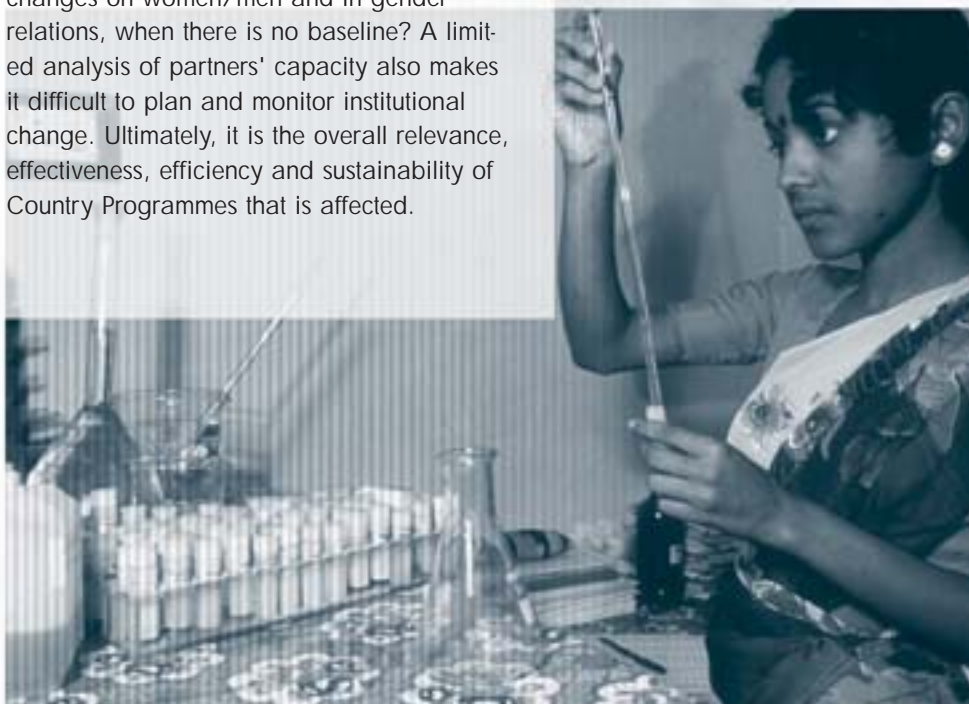
Shaping the Country Programme with gender
Avoiding gender evaporation ...

It is critical to analyse the national context through gender lenses, ensuring that both the national (endogenous processes) and the co-operation scenes (development aid, including SDC) are assessed (see sheets 3, 6). But this is not enough as, in SDC and in many other development organisations, experience shows that a gender-aware country analysis does not necessarily lead to gender-aware Country Programmes. «Gender evaporation» can happen when the gender needs and inequalities identified in the analysis do not shape the strategic orientation of programmes/projects. Gender equality gets «lost» in the multiplicity of challenges and problems targeted for action. Defining clear responsibilities for gender is critical to prevent evaporation.

Defining stakes ...
On the basis of the country or sector analysis, SDC and its partners identify the relevant «gender stakes» for the intended action or programme in the local/national scene and the cooperation scene

- What gender disparities are inherent to each sector/priority area?
- What gender inequalities are accentuated/accelerated by programmes (SDC, others...)?
- Who is already addressing gender in these areas/sectors and how?
- What are the potential alliances for SDC?
- Do SDC and its partners have a «comparative advantage» to address gender in these areas/sectors?

In SDC's programme in Tanzania, gender is a cross-cutting issue, but there is also a specific gender programme addressing strategic gender needs through support to NGO's or Government offices' specific actions.

GENDER IN COUNTRY PROGRAMMES

Gender stakes are identified at three levels. What gender issues and inequalities affect:

- Women and men in communities, households?
- Interventions (performance and sustainability of the programme)?
- Partner organisations (approach to gender in the current programme, constraints and opportunities to improve practices)?

It is important to distinguish, but also to link these three levels of analysis to come up with a realistic view of stakes that the Country Programme can possibly address.

Selecting priority areas of intervention …
Because resources are limited and needs are great, partners make choices about what they will, will not support. If the impact of a programme on gender equality cannot be the sole criterion for the selection of priority areas/ sectors for SDC, it should at least influence it. In a gender mainstreaming process, there is a need to identify if priority areas in the Country Programme offer scope to address gender relations or if other areas could provide a stronger leverage for gender equality. In other words, is it sufficient to integrate gender in existing priority areas to really make a difference on gender equality … or is it also necessary to invest in different areas?
To assess the gender potential of a priority area, or sector, four key questions are asked:

- What benefit (financial, human) is work in this sector likely to bring to women, to men?
- What cost might it inflict on women, on men?

- What potential for improving gender equality does it carry?
- What potential risk of negative impact on gender equality does it carry?

Links between gender and interventions exist in any sector. The challenge is to find the strongest link, i.e. the area/sector that carries the greatest potential to influence mechanisms that perpetuate gender inequality. In some countries, education carries the strongest potential, whilst in others, access to land or credit is a key discriminatory process that needs to be tackled.

The question … «is our choice of priority area/sector likely to impact on practical and/or gender strategic needs?» is therefore crucial. (see definitions of practical and strategic gender needs sheet 4).

Working on strategic gender needs is usually more difficult than working on practical needs. It requires more commitment, skills and, at times, gender specific programmes. Using a twin-track approach, partners can gradually integrate gender as a transversal theme in «traditional areas» whilst at the same time developing innovative/pilot actions in areas with stronger gender equality potential.

Continuing the dialogue …
To ensure the link between analysis and planning, the dialogue initiated during the analysis between SDC and its partners must continue. The focus should be on drawing lessons on gender from previous Country Programmes, programmes/projects and partnerships and taking measures to ensure that the future implementation strategies consistently and

In Bangladesh, gender mainstreaming is being carried out at both programme and organisational levels within SDC as well as in work with partners. The Coordination Office makes continuous efforts to increase gender competence and has put in place instruments aiming at integrating gender in all programme components (HID team + HID strategy). Concretely, support to develop gender strategies is provided to SDC staff and to SDC partners, common gender seminars with selected partners are organised on a regular basis and gender is a key dimension of the SDC controlling system.

Must have information in a gender-aware Country Programme

Context analysis
- Disaggregated data/information gender
- Gender aware analysis of key sectors and policies
- Information about key gender disparities in the country/sectors
- Information about local, national and international agencies working on gender
- SDC past experience and lessons learnt on gender

Proposed Country Programme
- Gender-aware working hypotheses, factors of influence and risk analyses
- Gender-aware (sectoral/thematic) and/or specific objectives (gender issues/gaps)
- Context relevant impact hypotheses of the Country Programme on women **and** men (relatively)
- Gender disaggregated and/or specific indicators (expected outputs and outcomes)
- Financial, human and technical resources planned for gender

explicitly integrate gender. If SDC or its partners do not have gender capacities, national or sector gender experts can be brought in.

Working with gender sensitive partners
Partnerships and alliances are key issues in the elaboration of gender-aware programmes. Are we working with the best possible partners/alliances to mainstream gender? What can be done to improve the capacity of existing partners? See sheet 10 on gender and partnerships

The process of formulating a Country Programme is as important as its implementation. The integration of gender concerns from the start - i.e. in the analysis of the context, the definition of stakes and the choice of sectors of interventions and partners – plays a major part in the mainstreaming of gender. However, Country Programmes are evolutive tools too, and efforts to integrate a gender perspective can have positive impact at different stages of the implementation.

Negotiating gender in planning

The integration of gender in programmes/projects supposes some pre-conditions:

■ Gender in analysis, objectives/monitoring in the Country Programme
■ Tools and methodologies to address gender issues
■ Access to gender aware/competent partners, management and «field» teams

Then, SDC and its partners have to define the goal of the programme/project and the specific objectives/effects it wishes to contribute to in terms of gender equality.

Dialogue with women and men in target groups

A dialogue is needed to allow women and men to reflect on their respective priorities for change (self-awareness/consciousness-raising process) and formulate them. This must lead to the identification of how women, and men, would like the programme/project to be implemented and what they expect it to achieve (impact hypothesis).

The process must be as transparent and as inclusive as possible of different groups of women and men in order to create their adhesion to and ownership of the intervention. It must be participatory, using public meetings, focus group discussions, interviews,

GENDER IN PROGRAMMES/PROJECTS

In Mozambique, a project supported by a European bilateral cooperation to renovate a market paid little attention to the wishes of women and men traders and mainly focused on the needs of the Municipality to rationalise and control the informal market and increase its tax-base. Organisations working with women traders were not consulted. This lack of dialogue angered beneficiaries who opposed the project. Subsequently, a gender analysis was carried out. It confirmed the need to improve communication, to work with local gender/women organisations and to support women (80% of traders) to be part of market committees in order to have a voice in the project.

visioning exercises, deeper studies, (sheet 3 on gender analysis). It is essential to facilitate the expression of women's **and** men's needs (e.g. by organising separate focus group discussions) and to disaggregate the data collected in terms of women's and men's different reactions, wishes, future contributions, expectations etc.

Dialogue with women and men among implementing partners

The role of women and men working for SDC and its partners is to support and facilitate change, including gender change. Their visions or beliefs should not «overrule» what women and men in target groups wish to do and achieve. When formulating the programme/project, they must consider external as well as internal constraints and opportunities for gender:

- External: What may be opportunities and problems to women's and men's equitable participation, access to decision-making and benefit from the programme/project?
- Internal: A dialogue *within* and between institutional stakeholders must assess to what extent SDC and its key development partners are willing, able, equipped etc. to work with gender (see sheet 9 on gender and organisations and sheet 10 on partnerships).

Gender in implementation

Working with women and/or men?

Women's participation is not equal to gender

To «include» women in a programme is not enough to claim that an intervention is gender aware. A women-only programme is gender-blind if it keeps women in traditional areas and does not offer scope for change towards gender equality. A mixed women/men programme is also gender-blind if it does not offer equal opportunities to women and men to participate and benefit according to their needs. A men-only programme (e.g. educating men on family planning) is gender-aware if it aims to change gender relations between women and men.

Of course, strategies promoting equal numbers of women and men in programmes/projects, including quotas, can really boost women's participation (e.g. % of women on electoral lists). But they are limited if women's participation is «silent» (i.e. no decision-making power). Quotas are often interpreted as a maximum and efforts are not made to reach a real gender balance. To be effective, these strategies need to be supported with capacity building and empowerment measures.

Women's organisations are not the only partners

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

In a rural development project supported by the Swiss NGO EPER in the RDC, only literate members of the community can be part of development committees. This is seen as a strategy to encourage women to join the literacy programme. In fact, women's multiple roles prevent them from participating in classes. Therefore very few are members of the committees and benefit from capacity building activities within the project. Yet, they are recognised as the engines of the community!
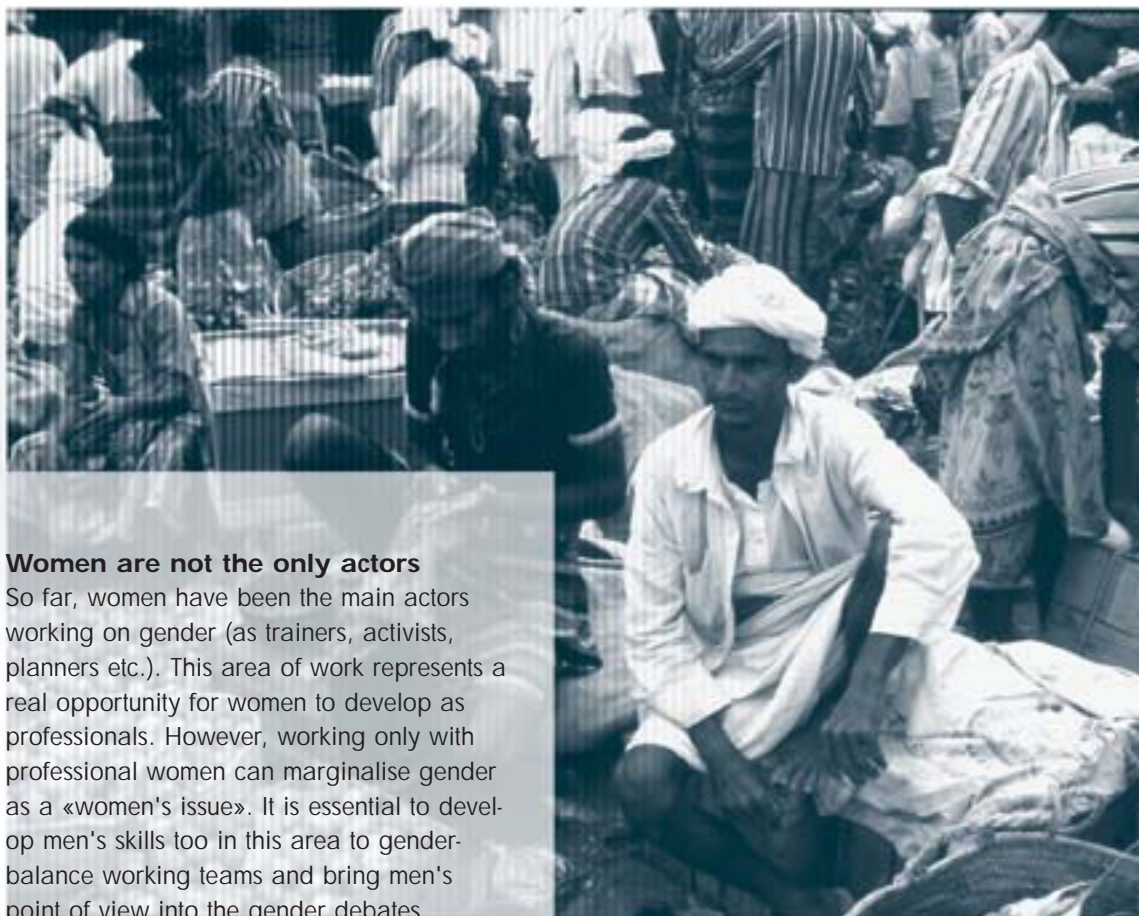
Women are not the only actors
So far, women have been the main actors
working on gender (as trainers, activists,
planners etc.). This area of work represents a
real opportunity for women to develop as
professionals. However, working only with
professional women can marginalise gender
as a «women's issue». It is essential to devel-
op men's skills too in this area to gender-
balance working teams and bring men's
point of view into the gender debates.

**Implementation through gender
lenses**
During implementation, the participation of
women and men and their respective access
to decision-making and benefits must be ques-
tioned. The point is not to create gender
problems where they are none. It is to ensure
that SDC and its partners keep a conscious
eye on gender. It is also to avoid some
«beneficiaries», women in particular, finding
themselves paradoxically worse off as a result
of «project» or feeling excluded from it (as is
the case increasingly with some men feeling
that «all projects go to women»).

Steering gender in annual planning
Annual planning is a key moment to reflect
on how programmes/projects affect women
and men and how they may be improved to
support gender equality further. It asks:
«Are we doing the right thing and are we
doing it right?»[1]. Answering this supposes an
assessment of gender changes in three main
«spheres», or fields of observation
(see sheet 12).

[1] See SDC monitoring tools
(controlling section, Berne)

Focus on the context

Annual planning requires a quick review of main socio-economic, political and environmental changes over the year and their immediate effects on women/men in the target groups. New policies, laws, political or economical events, programmes and actors that may affect gender in the sector or area of the programme are identified (see sheets 3, 11).

Focus on the programme

Annual planning must take stock of new gender related issues/demands that may have emerged during implementation (e.g. linked to unequal participation, decision-making, and/or benefits). Monitoring and budgets reviews are done through gender lenses.

Focus on the institution/partners

Annual planning must look at staff and partners: Do they effectively support the integration of gender in the programmes/projects? If the answer is no, there are two reinforcing solutions:

■ Partnerships cannot be altered overnight, if only for contractual reasons, but new alliances and synergies can be created to enhance the work on gender. Gender competent staff can also be hired to train and support existing staff.

■ Internally, actions can be planned to build the capacity of existing SDC/partners' staff on gender, to integrate it as a transversal in procedures (training modules, tools, indicators) and to promote equal opportunities (recruitment, HRD etc.)

For more on gender in organisations, see sheets 9, on gender and monitoring, see sheet 11.

In SDC-Peru, a gender planning workshop for programme officers led to specific activities in each project. The inclusion of a local consultant from the start provided an important impetus to implement the policy. A number of areas where a gender perspective could be integrated were identified in projects, and support to the process was provided from the core budget.

Dialogue is crucial in the formulation of gender aware programmes and projects. Women and men in target groups as well as partner organisations at all levels of decision-making must be part of this process. Working on gender is an investment. The i*mplications of integrating and of not integrating gender* in programmes and projects must be assessed. Lessons must be learned from the past and for the future.

GENDER IN PROGRAMMES/PROJECTS

CHECKLIST FOR INTEGRATING GENDER IN PROGRAMMES/PROJECTS[2]

▸ **Background and Justification**: Is gender part of the context analysis for the intervention? Are there arguments for gender mainstreaming and gender equality?

▸ **Goals**: Does the goal of the proposed intervention reflect the needs of both men and women? Does it seek to address gender issues and gaps through addressing practical or needs of men and women? Does it seek to address strategic gender needs by transforming the institutions (social and other) that perpetuate gender inequality?

▸ **Target groups**: Except where interventions specifically target men or women as part of a gender specific programme, do women as well as men benefit from the programme?

▸ **Objectives**: Do the intervention objectives address needs of both women and men?

▸ **Activities**: Do planned activities involve men and women? Are any additional activities needed to ensure that gender perspective is explicit (e.g. gender training, additional research, etc.)?

▸ **Indicators key question**: Have key questions been developed to measure progress towards the fulfilment of each objective? Do these indicators measure the gender aspects of each objective? Are indicators gender disaggregated? Are targets set to guarantee a sufficient level of gender balance in activities (e.g. quotas for male and female participation)? (**Sheet 11**)

▸ **Implementation**: Who will implement the planned intervention? Are these partners gender competent? Do they have tools and methodologies to implement in a gender-aware way? Will both women and men (professionals and target groups) participate in implementation? (**Sheets 9a, 10**)

▸ **Monitoring and Evaluation**: Does the monitoring and evaluation strategy include a gender perspective? Will it examine both content and process of the intervention? (**Sheets 11, 12**)

▸ **Risks**: Have stereotypes or structural barriers preventing full participation of women or men been considered? Has the potential negative impact of the intervention been considered (e.g. potential increased burden on women or social isolation of men)? (**8b**)

▸ **Budget**: Have financial inputs been «checked» to ensure that both men and women will benefit from the planned intervention? Has the need to provide gender training or to engage short-term gender experts been included in the budget?

▸ **Partners**: Have plans been made to ensure the capacity of partners to work with gender? (**Sheet 10**)

▸ **Annexes**: Are any relevant research papers (or excerpts) on gender included as annexes?

▸ **Best practice**: Has a communication strategy been developed for informing various publics about the existence, progress and results of the project from a gender perspective?

GENDER IN THE PROGRAMME CYCLE MANAGEMENT (PCM)

The current SDC's Programme Cycle Management concept[1] corresponds closely to the former PEMT concept. It is both result- and process-oriented. It allows stakeholders to improve the quality of their activities through joint planning, implementation, monitoring and (self-) evaluation in the context of joint activities. The focus is on partnership, mutual learning and cooperation management. A good basic understanding of PCM is necessary in order to integrate gender in it and analyse it as part of usual quality criteria.

The present sheet is meant for professionals who are already acquainted with the principles of the PCM[2]. Its goal is to give some incentives on how to integrate gender in the logical framework.

Gender and the logical framework (logframe)

The logical framework is a basic management tool used by SDC. It allows to conceptualise development projects, to give a structure for the analysis of complex realities. It helps to clearly communicate a planning for action but also to monitor or evaluate the results of a project/programme. One of the main principle of the logframe is to develop a vertical, logical hierarchy of objectives. Those objectives are linked with a corresponding level of results.

In order to mainstream gender and integrate it as a transversal theme, its use has to be completed by pre-planning gender analysis helping to improve the understanding of the main factors that affect women's and men's livelihoods in a particular context (e.g. access to assets, vulnerability, gender needs of target groups, policies, social development issues). For planning activities, the logic of the logframe should be shared, as far as possible, with our partners, in order to encourage ownership and allow an active participation by women and men in the process of planning and production of a log frame. The final plan has to fully reflect the principles and priorities of each party. It is the result of a negotiation process.

The practice of filling the logframe without this process and pre-planning activities is insufficient and does not correspond to SDC's concept. People should remain at the centre of development and project/programmes should be built on women's and men's practical and strategic needs but also on their strengths and potentials. For complex programmes, several logframes might be necessary to capture the different implications of interventions.

[1] See also «Guidelines evaluation & controlling», SDC, May 2002
[2] For more information, refer to documents developed by E&C Units

GENDER AND THE LOGICAL FRAMEWORK

Are relevant gender relations, inequalities and/or resistances to gender considered in the external factors?
Have the hypotheses and assumptions been tested?

Do indicators – qualitative and quantitative – at all levels disaggregate gender as relevant?

Were gender inequalities reduced?
Did the programme/project contribute to the improvement of the standard of living for women and men?
What «lessons» were learnt about the integration of gender?

Did women and men equally contribute to design the programme/project goals?
Could women and men give their points of view concerning the existing problems?

Could partners express their vision concerning gender and development, equality between men and women?

Do they address gender issues/gaps through addressing practical needs of women and men?
Do they address strategic needs by transforming the institutions that perpetuate gender in equality?

External factors (risks, potentials, challenges) and hypothesis

Key questions, criteria, indicators

Levels of results

Hierarchy objectives

Context

Sphere of influence, partnership, cooperation,

1. External factors (risks and obstacles, challenges and driving forces…)

1. Key questions (relevance), indicators, information source. (How to assess our contribution to…?)

1. Impact, long-term changes/effects

Do key questions/indicators measure changes within direct and indirect groups?

1. Goal (development objective) to which the programme is intended to contribute

2. External factors

2. Key questions, (effectiveness), indicators, information

2. Outcomes

2. Objectives of a programme/project

Sphere of direct and immediate responsibility

| 3. Direct operational objectives | 3. Outputs | 3. "Indicators", information sources | 3. External factors |

Activities

Inputs

Is gender explicit in the objectives?
Should there be specific gender objectives?

Are gender issues affecting implementation?
How committed are women and men key actors (ownership)?

Are women's and men's strengths and potentials equally reinforced?

Did the partners develop gender competencies?
Did they transform their practice, change attitudes?

What strengthens or hinders the work towards more equality among women and men?

Do the objectives tale women's and men's points of view into account?
Do they reflect women's and men's specific problems/potentials/interests/dependencies?

Are means/resources appropriate to support gender mainstreaming?
Should there be specific resources to mainstream gender/reduce gender gap?

Do women and men equally benefit from the project/programme resources?

Are all key questions/indicators gender disaggregated?

Is gender mainstreamed in all activities?
Do all activities provide equal opportunities for women and men to participate and benefit?
Do activities for each result take women's and men's needs, opportunities and constraints into account, as relevant?
Should there be specific gender mainstreaming in the institutions involved?
Do planned activities involve both women and men?

GENDER IN THE PROGRAMME CYCLE MANAGEMENT (PCM)

The three levels of results

PCM distinguishes three levels of results in cascades, which correspond to different spheres of responsibility and influence.

- The first level compares the inputs/outputs of a project/programme and allows measurement of its efficiency (sphere of direct responsibility, what a programme has to guarantee).
- The second level is today the principle level of results of the programme/project. It measures the obtained results and processes according to the project/programme objectives. The outcomes gives us information about the effectiveness of a project/programme (domain of influence, partnership wager, mutual expectations).
- The third level puts the focus on the impact of the project/programme and allows analysis of its relevance (to what the project/programme contributes, in relation with the general context).

Efficiency

Efficiency is a measure of how economically resources/inputs (financial, human, material resources required for programme/project implementation, time, etc) are converted into outputs. At his level, we look at the programme/project immediate deliveries (goods or services) generated by the activities. It also represents the hard core of partnership and mutual commitments. To integrate gender at this level, check if:

- Partner identification includes gender criteria, SDC's partners are gender sensitive and gender competent or willing to learn
- Women's organisations are well represented among SDC partners
- Agreements, contracts, procedures are gendered
- There is mutual commitment on gender issues
- Gender trainings and specific actions to mainstream gender (e.g. in institutions, procedures, etc.) are planned if necessary
- The gender approach is integrated in all activities and all tools are used
- Operational objectives address/reflect women's and men's practical/strategic needs
- Activities are planned and resources are used to equally respond to women's and men's expressed needs
- Expected results focus on the roles, resources and needs identified as priorities by the beneficiaries, women and men
- Women and men have equal access to the programme/project means and benefit equally from the project
- The work load issued from the project activities is shared equally by women and men. At this level, the programme/project will take care that women will not only be «used» to reach the expected results meeting practical needs, as it is often the case, but will also benefit from it to meet their strategic needs.

Effectiveness

This is the extent to which the programme/ project's objectives were achieved. At this level, we try to identify to what extent the outputs produce the desired outcomes, that means the immediate or mid-term effects/ results which are observable. Generally, several outputs are necessary to attain an outcome. They also depend on the quality of the partnership, the contribution and commitment of the main stakeholders. This last point is very important to promote gender in projects/programmes. To integrate gender at this level, check if:

■ Gender responsible and/or gender competent staff are implicated in planning activities or other key-moments of the project/programme
■ The partners agree on the fixed objectives, participate to their formulation
■ Cooperation and collaboration on gender issues lead to changes of the practices, of behaviours and power relations between women and men in the partner organisations, in the programme/project
■ Mutual gender expectations are met
■ Programme/project objectives address/ reflect the needs of both men and women, that means that the objectives are engendered or there are specific objectives to address women's and men's needs.

Relevance

This is the extent to which the goal or development objective(s) of a programme/project is consistent with women's and men's practical/strategic needs, country needs and global priorities. At this level, we try to have information about the impact, that means the positive or negative, intended or unintended, long term changes/effects on women and men a programme/project has contributed to. To integrate gender at this level of analysis, check if:

■ The project/proogramme has gender-disaggregated results to be able to assess its relevance
■ The results are relevant to the beneficiaries, make sense for them
■ All identified women's and men's needs/ problems but also strengths and potentials are reflected in the development objective
■ The programme/project is coherent with national, sector and SDC gender politics and priorities
■ The project/programme contributes to more equality between women and men, girls and boys and has not reinforced or reproduced inequalities as development agencies sometimes did; opportunities and life chances become/remain equal
■ The project/programme has no negative effects on women and men
■ The project/programme has identified and reinforced local positive gender dynamics
■ Whenever possible, the project/programme involves in policy dialogue concerning gender issues or supports local organisations working in this field, in order to create favourable conditions and changes towards gender equality.

Sustainability

There are strong links between the effectiveness, the relevance and the sustainability of a programme/project. Experience showed that integrating gender and diminishing inequality between women and men contributes to sustainable development. It is important to raise awareness among the responsible persons of a programme/project on this point. Here too, the partners should know the basic methods to deal with the sustainability question and integrate gender in them. The discussion is especially important concerning the effectiveness of a programme/project, within the sphere of influence of the programme/project and the partner institutions, on a medium-term time horizon. The results/benefits should guarantee sustainable gender effects, that means effects that last after the conclusion of the programme/project. Check if:

- The different situation of women and men has been taken into account (differentiated gender approach)
- The programme/project focuses on main interests of women and men (ownership)
- The user groups equally benefit from the programme/project and have increased access to resources (income, education, health services…)
- The project/programme takes «equitable benefits for woman and men» as a key criterion (social viability)
- The effects of the programme/project make sense for women and men
- Ecological effects for women and men have been considered as well as the ecological context (e.g desertification context)
- Partner organisations are learning-oriented and are willing to put gender issues in the mainstream (gender institutionalisation). They have gender balanced practices
- There are supportive framework conditions, e.g. supportive gender national politics, respect of human rights, dialogue and negotiation culture…

Why is gender an organisational issue?

No organisation is gender neutral. Government ministries, NGO, consultants, training organisations as well as private enterprises etc. have their own institutional culture, values and competence/experience in their respective fields. Their «identity» greatly influences how gender is taken on board institutionally. In addition, within all organisations, there are individuals (women as well as men) who support or challenge the principle of «gender equality». Often, this happens regardless of the commitment of their organisation on the issue.

In SDC central offices in Berne, women as well as men are challenging the view that those who work harder are those «working after hours». Women and men with families, or simply with social commitments, think of other ways of organising their working time. This requires flexibility on the part of the organisation. The efforts – financial or otherwise – the organisation has to make to accommodate these new demands are justified as the greater satisfaction people get from a more balanced work/life is returned to the organisation as higher productivity and commitment.

The implications of integrating gender in organisations are complex and multi-level. Gender equality deals with power, so it is a political issue. Since we are all either a woman or a man, it is a personal issue. Mainstreaming gender requires tools and know-how, so it is also a technical and a personnel issue.

Integrating *(or institutionalising)* gender in organisations is a strategy to reinforce the awareness and capacity of SDC and its partners (to mainstream gender):

- Integrate gender as a transversal theme in programmes and projects (sheet 2/8a)
- Implement gender specific programmes (sheet 2/8)
- Promote Equal Opportunities internally (sheets 9a, 9b)

Usually, prioritising gender equality leads to a transformation of organisational systems and of individuals within them. This transformation can be both a pre-requisite and a result. Organisations set both tangible and intangible conditions for women and men they employ. These conditions define not only what women and men are expected to do (included in the contract, the job description) but, to some extent, how they are expected to behave. The latter is usually not explicitly defined, but messages are sent.

FRAMEWORK FOR AN ORGANISATIONAL GENDER ANALYSIS[1]

Organisational issues to consider	Key questions to assess gender
Commitment and policy The extent to which gender is included in the policies of an organisation is a strong indicator of gender commitment and its translation into practice. The participation of women and men in policy formulation and decision-making is also a useful indicator as women and men often bring different points of views and sensitivities to the process, hence enriching it. The role of external influencing factors must also be assessed.	■ Is there a gender policy? How is it monitored? ■ Is gender integrated in other policies? How is this done, monitored (sheet 6)? ■ How do external factors (e.g. funders) influence gender in the organisation? ■ Is senior management explicitly committed to gender? How is this translated in practice? ■ What role do women and men play in policy formulation and decision-making?
Budgets Gender mainstreaming needs financial resources. Programme budgets as well as special budgets can be used to organise training, develop tools, do research, organise seminars and campaigns etc. The allocation of resources for gender is political and often requires some lobbying. Programme officers in countries and in headquarters are responsible to ensure that resources are planned and used for gender.	■ What % of programme/project budgets are allocated for mainstreaming gender? ■ What % of programme and human resource development budgets is allocated to gender mainstreaming? ■ What are «gender budgets» used for? ■ How are budgets reviewed for their gender sensitivity? How are they monitored? ■ How is gender budgeting included in policy dialogue and dialogue between partners?
Competence/capacity Building the gender competence and awareness of all «stakeholders» at all levels is crucial. Capacity building for gender (e.g. a workshop to develop gender indicators) should be seen as part of programme development and use existing budgets as much as possible. Different training approaches are possible, from the «professionals» to the more «personal» approach. A combination of both is useful to make gender a matter of attitude and not only skills.	■ Who in the organisation is gender competent (women/men, with what responsibility, in which sectors etc.) and what is their level of competence? ■ What specific skills and tools do staff need to carry out their job in a gender aware way? ■ What existing capacity-building initiatives include gender e.g. gender network? Which could include it? ■ Which trainers are gender competent? ■ What incentives are there to motivate staff to be (more) gender competent? ■ Which staff have gender included in their job description?
Procedures/tools	

der. Even illustrations and language (e.g. the use of he/she) in manuals have to be checked so they do not stereotype gender relations. Existing tools and procedures often need to be revised to provide better gender disaggregated qualitative and quantitative data. Sometimes new ones need to be created.

- What initiatives have been taken so far to engender tools and procedures?
- What guidelines are available to staff to help them transform their existing tools and procedures, or create new ones?

Culture

Organisations evolve within national/regional cultures and are influenced by them. But they are also influenced by the profiles of the staff, their personal and professional beliefs, their mandates, funders etc. Organisational cultures are made of complex and intangible conditions and factors which need to be decrypted as part of a gender assessment.

- How does information flow in the organisation, formally or informally? To what extent do these «flows» include women as well as men?
- What are the main shared values of the organisation? How do these relate to gender equality?
- Is decision-making centralised or decentralised? To what extent do individual women and men have access to it?
- What is the attitude towards female/male staff?
- To what extent are certain practices (e.g. working late) valued and do they discriminate against women/men?
- What is the incidence/perception of sexist remarks, sexual harassment?

Human resource management and Equal Opportunities (EO)

The creation of a safe and practical environment for women and men to work in (e.g. transport issues, working hours, travel conditions and commitments for fieldwork, toilets, childcare responsibilities) is critical to gender mainstreaming. It is hypocritical and not efficient to promote gender in programmes and projects and to ignore it inside organisations. Practical and strategic needs of women and men must be identified as part of a gender organisational assesment.

- What is the current gender balance of staff in different posts?
- Is there an EO policy? What gender issues/gaps does it address and how is it implemented?
- Is gender a criterion in the selection of partners, consultants, staff – women/men (how)?
- What working conditions/requirements may discriminate against the employment of women/men in certain jobs/posts?
- Is being a woman, or a man, considered an advantage or an inconvenience for certain jobs/tasks?
- To what extent are E.O discussed in relation to programme efficiency and sustainability?

Responsibility

All staff is responsible for integrating gender whatever level they work at. It is important to ensure that gender responsibility is not
a) given to junior staff with no real power
b) given only to women
c) located only in social sectors
d) concentrated in the hands of a few people.

- Who (women/men) is responsible for gender? What decision-making status do these people have? How are they perceived by the rest of the staff? What are they responsible for?
- Does staff responsible for gender have terms of reference, skills, resources, incentives and management support?
- How are they involved in policy and/or programme planning?
- What mechanisms ensure the sharing of gender lessons within/between SDC and its partners (e.g. networks)?
- What mechanisms ensure the performance of gender responsible staff and gender advocacy competence?

In many SDC coordination offices and partners organisations, equal treatment between women and men is an issue. Less women than men are heads of coordination, programmes/projects. In the field, project working conditions (e.g. security, distance to be run on motorbikes) limit women's recruitment in the posts. Yet, there is a direct link between the presence of women in decision-making and teams in general and the treatment of gender in programmes. The question is whether women should always have the same working conditions as men in the name of equality, or should organisations change to accommodate specificities of women and men? Finally, let's remember that appointing women, or men, is not only an Equal Opportunities issue. It is also a strategy to reach target groups better, women in particular. This aspect is crucial in regions where access to women is difficult for cultural reasons.

«Project Consultants prefer working in mixed teams. Clients interviewed had different preferences. Some women mentioned that due to the cultural and traditional aspects, they prefer working with male consultants since they tend to trust them more; some expressed preference for female consultants who listen and understand specific women's concerns better». *Assessment of gender equality in the Kyrgyz Republic (1997/1998)*

Monitoring gender strategies in organisations

In SDC controlling terms, changes in institutional procedures and capacities belong to the sphere of «direct responsibility» (see sheet 11 on monitoring levels).

In this sphere, gender monitoring is «inside looking». It observes and steers gender in institutional and human development. It focuses on the **efficiency** of gender strategies, inputs and short term outputs. Indicators follow the progress of integrating gender in institutions and the effects this process has on institutions, actors and procedures.

What to monitor depends on organisations' gender strategies and objectives. It can include activities to change procedures (e.g. ToR, planning methodologies), to generate gender data (research) or to build the capacity of staff to work with gender. It can also concern initiatives related to partners, e.g. dissemination of good practice and engendering the institutional environment (equal opportunities between women and men as members of staff).

Responsibility to monitor lies primarily with the COOF country director and leaders in partner organisations. Gender and programme officers can provide technical assistance, as well as regional/thematic desks (HQ).

Introducing gender in an organisation procedure is an entry point to impulse sustainable transformations in organisational culture and to modify staff attitudes towards gender. These transformations take time and may be observed over a longer period.

What can gender indicators measure in the organisation?

- Quantity/quality of gender competent staff (women/men in SDC/partners)
- Changes to/creation of tools, methodologies, procedures to integrate gender
- Initiatives/partnerships to create synergies on gender
- Importance of gender in dialogue between partners
- Use/recruitment of gender skilled staff (w/m)
- Changes to implement equal opportunities
- Budgets (financial/time) used for mainstreaming in the institution (e.g. % of total budget)

In terms of gender, changes inside and outside are connected. Mainstreaming gender in organisations helps mainstreaming in programmes and projects. It is hypocritical and counter productive to promote gender with partners and in its programmes without practising it internally.

A part of gender mainstreaming

In 1990, the first working group on the promotion of women in SDC was implemented. The aim was to improve the representation of the women in the management positions following the directives of the Swiss federal administration. An analysis of the situation of the women in SDC was conducted and first proposals were presented. For 6 years, the group was working on setting objectives, trying to promote changes in the organisation by lobbying, sensitisation and education. However, due to the lack of institutional commitment and to the limited competencies of the working group itself, implementation failed.

This showed the limits of a bottom up approach and evidenced that the process **had to be anchored at the top level**. In 1996 SDC decides to allocate clear responsibilities and resources for gender equal opportunities within the headquarters, in order to concretise the political will.

A position for the advancement of women to advise on/monitor/support and co-ordinate the process was created (50%). Meanwhile, the management took the responsibility to ensure that the advancement of women in SDC would be a compulsory, permanent managerial task for superiors at all levels and part of the management process. An internal policy on the advancement of women in the SDC was approved in 1997 and its implementation is still going on.

Embodiment of the policy and its objectives

The promotion of gender equality and the advancement of women is an institutional goal as mentioned in SDC's guidelines and strategy 2010. It is a transversal focus with concrete objectives in SDC's human resources strategy and is part of SDC's gender mainstreaming policy.

Overall goal: to give equal consideration to the needs and concerns of women and men in its programmes and organisations in respect of its staff and their families. Due to traditional structures, attitudes and values carried by men and women, the needs and concerns of women have not been given the necessary attention to date. Accordingly, specific efforts should be made to promote the advancement of women by the year 2010.

Specific objectives: equal representation of women and men, vertical and horizontal development potential, complementarity between career and family, gender equality integrated in corporate culture.

Responsibility for ensuring the process is clearly at the management level. The officer for advancement of women is in charge of advice, monitoring and support and is directly answerable to the Director.

Strategy and Process

- The conceptual framework for the advancement of women in SDC is based on a combination of systemic and process-led approach. The promotion and advancement of women suppose changes in seven fundamental dimensions of the organisation such as: strategies, function power positions, physical resources, processes/procedures, people/groups relationships, structures/organisational subdivisions and the identity.

- Genuine advancement of women is brought about through decision-making processes combined with a process of culture and organisation such as changes in mentality, calling for appropriate learning processes. A classical linear approach (planning, analysis, design, implementation) is not convenient, the implementation needs a constant monitoring, flexibility and adaptation of strategies. It is more complex than expected and looks more like a spiral then as a straight line process.

- The overall strategy is gender mainstreaming. It means that gender equity is implied in internal (human resources) and operational strategies as well as in all capacities and skills building. To guarantee the equal representation of women and men from lower to upper management functions, considering the existing unbalance, a complementary women empowerment strategy is necessary as well.

- Equal opportunities for women and men are incorporated as a transversal issue in the top management's programme and in the annual programme of the different departments, each one setting its own annual objectives.

- A continued controlling including the presence of the officer of advancement of women in all human resources decisions is still imperative to guarantee the implementation of the policy.

Some selected operational objectives and its implementation measures

Objectives:	Implementation measurements
Equal representation of women and men from Programme Officer function up ■ 50% women in newly recruited ■ 60% women in Junior staff development programme ■ 50% women in Management development pool	In SDC women are under represented in all upper functions. Measures are ■ to hire women as well as to promote young women to take over leading positions tomorrow. ■ to give preference to women with the same qualifications ■ non-professional experience is taken into account in job profiles ■ all selection committees should comprise women and men ■ include women in the junior staff development programme ■ Gender bias are analysed in all staff selection assessment
Vertical and horizontal development potential ■ Planning long-term carrier for women and men ■ Taking the specific feminine careers development into account	The development of women's careers is not as linear as those of their male colleagues. Women often have double engagement in profession and family and not much time to invest in traditional career life. ■ Women and men with family and professional engagement get a specific career planning ■ Determine which leadership and management experiences the employees can obtain at their actual living situation.
Compatibility of career and family ■ Creation of day nursery ■ Modern and flexible working conditions	The incompatibility of career and family is still a disadvantage especially for the women and men to make a career within SDC. Flexible models of work and their acceptance help to overcome glass ceiling phenomena. ■ Management should accept job sharing in senior positions ■ Part-time employment must not result in career disadvantages
Corporate culture in which equal Gender opportunity is practised ■ 40% women in higher positions	As long as women remain in the minority the organizational culture will not take the so called more feminine culture into account. ■ For higher positions SDC will give the preference to women with the same qualifications ■ To ensure gender sensitivity, management is trained in gender issues to avoid gender bias in human resource management (recruitment, staff evaluation etc.). ■ Gender competence is a criterion for staff selection.

Call for action

SDC is committed to gender equality, which is the conditio sine qua non for a change towards gender equity. Several results i.e. higher representation of women in lower management positions some changes in the corporate culture, day nurseries have been obtained in the last ten years. At the same time we can observe a change in the overall Swiss cultural context as well, which is also influencing the organisational culture of SDC. Nevertheless, implementation of gender equality is a complex and long process.

Best practices

- The allocation of human and finance resources to support the process of equal opportunity.
- The presence of the responsible person for equal opportunity at all staff and decision making process to guarantee the reflex of remembering equal opportunity and cultural issues.
- The integration of equal opportunity objectives in the human resource strategy and policy.
- The integration of the controlling of equal opportunity in the overall organisation strategic controlling.
- Setting of equal opportunity goals in the organisation units as well as for the top management.

[1] Glass ceiling:

Is gender a criterion for selecting partners?

Gender competence is part of the criteria for the selection of partners, including contractors. SDC increasingly gives preference to partners who are gender competent, or, at least, open to gender equality. It goes against SDC development policy to work with partners who do not support the principle of gender equality.

Therefore, building gender competence should be negotiated and explicitly mentioned in all contractual partnerships between SDC and Swiss/national organisations. Gender competence is increasingly becoming a criterion against which the performance of partners and contractors is assessed.

How to promote gender in partnerships?

Create a dialogue around gender

Gender is a «cultural issue» but it is also very political. Mainstreaming social justice and equality issues in the development agenda is often controversial as it poses a challenge to the status quo around power at different levels. The fact is that it remains difficult to argue in favour of equality between women and men as a right, including staff in development organisations (women as well as men, from Swiss or other origins). This said,

the importance of gender in countries where SDC works means that partners increasingly take the lead to initiate a dialogue, and actions, on gender.

Questions that can be raised include:

- What is the partners' view on «gender». Is gender equality an issue, why/why not?
- What gender inequalities do they see as particularly relevant to their work and why?
- What is their experience (good or bad) of working with/without gender?
- What gender skills/competence do they have?
- How far are they interested in going with gender mainstreaming and why?
- How aware are they of their own country's policies/commitment to gender?

GENDER AND PARTNERS

We would like to encourage all partners involved in SDC work in countries to formulate and own a joint charter.

Throughout this dialogue, it is necessary to assess to what extent the views of professional staff are representative of their organisation as a whole and of women and men in target groups. The participation of professional women and men in defining the terms and conditions of partnerships around gender is important in terms of women's/men's equal access to decision/policy making. But it is also important since it can really influence the outcome of negotiations in terms of gender content.

To work together on gender, SDC and its partners must identify common grounds, visions and strategies and decide jointly how they are going to integrate gender in their organisations and programmes. The charter below is an example of what it could mean to integrate gender in partnerships.

A gender charter between SDC and its partners

■ SDC and its partners are aware of the roles, needs and priorities/aspirations of different groups of women and men in the context where they work prior to making decisions about what sectors, resources and strategies they will implement. They are aware of particular inequality and discrimination issues negatively affecting women's and girls' development;

■ SDC and its partners select the areas/sectors of interventions on the basis of the identified needs of women and men, including discrimination and inequality issues affecting women and girls. They give priority to interventions most likely to have a sustainable impact on mechanisms responsible for gender inequality. They reflect these needs in the formulation of principles, objectives and the allocation of resources in Country Programmes and Annual Programmes.

■ SDC and its partners formulate Programmes and Projects that have a clear objective to help both poor women and men to reach a more equal access to and control over resources in the household and society at large, and, as much as possible, to reduce inequalities between women and men;

■ SDC and its partners implement Programmes and Projects in a way that ensures that women and men have equitable, if not equal, access to and control over resources provided by the interventions;

■ SDC and its partners facilitate evaluations (self and external) of Programmes and Projects that provide clear indication of the impact on women as well as men and on the changes in power relations and inequalities between women and men in different groups of the targeted population;

■ SDC has alliances with partners who are gender aware and competent, working transversally in sectors and/or specifically around issues of women's empowerment and/or gender equality;

■ SDC and its partners promote equal opportunities for women and men as workers in their respective organisations, and ensure that relevant women and men are able to plan, implement and evaluate their actions with target groups in a gender-aware way.

GENDER AND PARTNERS

Capacity building of partners

Too often, gender training is used as the main, or only strategy for mainstreaming. But the integration of gender equality in development is not only a matter of having the right skills and tools. It also requires positive beliefs and attitudes towards gender. Therefore, capacity building cannot be «reduced» to «gender training». Training should be part of a broader gender awareness and capacity building strategy, besides the analytical and planning skills and tools that training can provide, staff within SDC and its partners also need:

■ Technical advice/follow up on site
■ Participation in gender networks
■ Gender data to build arguments and feed into advocacy for gender change
■ Regular capitalisation/stock taking
■ Dialogue/action to promote ownership of the gender and development approach

In the CEI Division, the whole team has decided to take gender as a team building theme. The first steps was to come to a common understanding of the concept by workshops, followed by training for most of the programme officers, finally placing an emphasis on gender during a key event in each field office (planning of a new programme, monitoring workshop, assessment of an health project etc..)

This said, training is important[1]. It can target participants as professionals (focus on their practice) or as individuals, focusing on their personal attitude towards gender (self-awareness), often both are needed because complementary.

In SDC-Asia[1], as part of the Human and Institutional Development approach, workers examine their **own personal** gender biases and experiences as women and men. Equal Opportunities and the advancement of women in SDC and partners is seen as a key strategy for mainstreaming. In Latin America, the capacity building approach is more technical. Staff and partners are targeted as «**professionals**». The objective is to make them more effective, efficient and relevant in their work with beneficiaries through the gender approach.

[1] Every year, SDC organises two 3-day gender training workshops in Switzerland, for its staff and partners. One is in French and one is in English. For more information, contact the training services from SDC or the gender unit.

GENDER AND PARTNERS

Some hints to implement effective gender training

- Carry out an organisational analysis and/or a training needs analysis (sheets 9a, 9b)
- Have a methodology for different target groups, including monitoring after training
- For basic training, a «standard» programme can be used for all staff
- For advanced training, aim for tailor-made programmes as much as possible
- As much as possible, use authentic documents (case-studies, policy extracts etc.) and a participatory approach (with group work, practical applications)
- Try to have a gender-balanced team including experienced male gender trainers
- Aim to train in pairs, with gender and sectoral trainers working together
- As much as possible, work with a local consultant in the training team
- When training project staff, ensure that trainers have field experience too
- Train women as well as men, from different professional profiles and levels of responsibility. Mixing profiles/levels should be a strategic choice
- Think of training existing trainers in gender (multiplying effect)
- As well as implementing specific gender training programmes, do not forget to integrate gender in existing training programmes and modules!

For training to have an impact, trainees have to be supported to implement their new skills. In particular, they need political support from their managers to give legitimacy to the organisational changes they may wish to propose for mainstreaming. They also need technical support from gender officers or experts, so that they can do their work well. When people feel they have little confidence in their skills and knowledge, they do not dare to work on gender as they fear that failure to deliver can discredit the approach. Finally, newly-trained people need resources to implement their strategies (time, money, staff).

After initial training, more advanced and/or specialised gender training can be implemented. It can focus on the link between gender and specific sectors or themes (e.g. environment, governance, human rights) or on the PCM (gender in monitoring/evaluation). Gender can also be included in training around participative methodologies such as PRA or advocacy training. Self-awareness training on gender is also useful to help women and men explore their own attitude to feminity/masculinity, at home and/or in the workplace.

In many SDC countries, internal gender networks provide a useful platform to reinforce gender confidence and competence. External networks (with other donors) are also useful. Regional networks can be created (there is a South America network and a similar idea is germinating in West Africa)… Internet is a great tool to maintain contacts between trainees across countries and share both happy and unhappy experiences working with gender!

SDC and its partners need to work out joint strategies for gender mainstreaming. Capacity building of local partners should be a central objective of partnership and be increasingly recognised as a key factor in the selection and the monitoring of partners.

MONITORING GENDER IN PROGRAMMES

Monitoring is the art of collecting the necessary information with minimum effort in order to make a steering decision at the right time. This information also constitutes an important and necessary data base for analysis, discussion, (self-) evaluation and reporting. As a regular and systematic process integrated in the cycle of projects/programmes, monitoring is different from evaluation. The aim is to see if programmes are «doing the right thing and are doing it right» in order to improve their quality.

Gender, as a transversal theme, needs to be integrated in all monitoring systems (engendering monitoring). It helps us to keep in touch with field reality and provides us with qualitative and quantitative data about:
a) the contribution and participation of women and men in the realisation of the objectives and b) the effects of the programme on gender relations and disparities. But a monitoring system can also put the focus on women and men equality in a programme/project (gender monitoring).

As for planning activities, beneficiaries and partners must be closely involved in the monitoring process. Programme officers carry the main responsibility to ensure that gender is part of monitoring, under the overall responsibility of the COOF coordinator.

[1] See «Monitoring – keeping in touch with reality», part II: Instruments and procedures and III: Indicators and key questions, SDC 1997.

Fields of observation
We can't observe everything at the same time. We have to choose what kind of information is relevant for the project/programme. We might need different tools for the different levels[1]. The main involved actors (women and men beneficiaries, partners, programme/project staff) at all levels have to be made responsible to collect regularly the necessary data. It is to remind us that in a engendered monitoring system, it is not only women who are responsible for collecting information concerning gender issues.

Output monitoring

A monitoring system at this level has to remain simple and feasible. We have to check whether we have reached the expected gender results or not and whether we do control what is in our sphere of responsibility.

- What is the actual gender performance of the programme/project? What «is» compared with what «should be»?
- Do we have desegregated data for women and men?
- Have the contracts, the formal agreements been respected?
- Is there financial accountability?

If the difference between planned and expected gender results is too great, the course has to be corrected.

Outcome monitoring

For SDC and its partners, this is the critical and essential sphere to monitor. Here monitoring focuses on effectiveness, i.e. the achievement of programme objectives and medium term outcomes.

- Have the relevant groups to make things change, organisations or individuals, been involved and reached by the programme?
- Did the attitudes and behaviours, the capacities, the practices, the social position of women and men change?
- What were the desired/undesired effects of the project/programme on gender equality?
- Did the transfer activities bring the expected results (multiplication)?
- Did the project meet the practical as well as the strategic needs of women and men?

We might be interested too in knowing how we have achieved something or why we have – or have not – achieved the output or outcomes. Or why, with similar environmental conditions, we are successful in one place and not in another. At all levels (output/outcome or impact level), we need to understand the processes and try to correct what is in our sphere of responsibility/influence.

Process monitoring

Process monitoring can be done at each organisational level. Understanding what SDC and/or our partners do well/not well on gender is important for «learning».

- Are the form and dynamics of partnership satisfactory for all parties?
- Have the roles and tasks regarding the implementation of gender issues in the programme been defined?
- Have the agreements, contracts, procedures concerning gender been respected?
- Is there mutual commitment for gender issues? Are mutual expectations met?
- What were the furthering/hindering processes in the project/programme to reach the planned gender results?
- Has enough gender capacity building been done?
- Have the partners, women and men, been empowered?
- Is the team functioning in a satisfactory way?
- Have the dialogue and negotiation between the main partners, between women and men in the programme/project improved/deteriorated?
- Is there a capacity to focus on common interest of women and men?
- Is there sufficient trust, respect, consensus and conflict resolution capacity among the partners, among women and men in the programme/project?

MONITORING GENDER IN PROGRAMMES

Impact analysis

Impact analysis is too complex to answer with monitoring and should be the subject of a wider impact study or evaluation. It may take place every 5 – 10 years. It requires «before/ after» disaggregated indicators. At this level, we analyse the programme/project's contribution to changes in a given context, in the long term. This is the most difficult sphere to analyse because it is mainly out of SDC's «control», i.e. the achievement of long term development goals. We can only monitor what is observable during a programme, register desired and undesired effects.

To analyse the relevance of a programme/ project, we need impact hypotheses which should be formulated and verified by signifi-cant partners and the main key actors (e.g. women and men concerned by a health project, programme/project officers, Health ministry officers).

- Did the project/programme contribute to reducing gender inequalities?
- Could some changes of gender values be registered?
- What were the desired/undesired gender effects of the project/programme?
- Are the results consistent with SDC gender policy as well as the gender politicy of the host country where we work?

At this global level, existing sources of infor-mation must be used. Responsibility to ensure analysis at this level lies with regional and sector officers and with COOF country directors, working closely together with partners at national/policy level.

We must distinguish between monitoring gender as a transversal theme in pro-grammes within our sphere of competence and influence as a cooperation agency (medium term), and the results of this approach on social transformation. This takes time and has to be led by local «actors» over whom our influence is extremely limited. Social changes can be measured over longer periods (5 – 10 years) and our programmes can only make a modest contribution, at best facilitate the creation of favourable conditions for change. Results must therefore be observed primarily at the level of the systematisation of the (gender) approach in all actions of the Swiss Cooperation. Social change will come later.
SDC Madagascar, PDR

MONITORING GENDER IN PROGRAMMES

Context monitoring

Context monitoring shows risks and potentials. It is essential to follow the general context (economical, social, environmental...) in which the project/programme is implemented to a) check the evolution, the tendencies and changes which can influence gender in the programme/project, positively or negatively; b) try to measure how the programme/project has contributed to changes in a particular context. Context monitoring is important for the formulation of impact hypotheses.

Information collected with the help of general macro-indicators developed for instance by UNDP gives us relevant information for the programme/project. But it should not be confounded with the indicators of the programme/project (see chapter key questions and indicators below).

Sustainability monitoring

The sustainability of gender results in a programme/project is an important issue. Momentarily attained benefits for specific groups, e.g. women's groups are not relevant if sustainable effects cannot be guaranteed. At each stage of a programme/project, strengths and weaknesses regarding ownership of a programme/project and its sustainability should be analysed with the partners and appropriate measures to be taken to sustain the results should be agreed on.

What can gender general macro-indicators measure in the general context?

- Mortality: Female/male, maternal mortality, infant (girls/boys)
- Rates of unemployment/employment/self-employment in different sectors
- Type/conditions of employment for female/male
- Access to basic services (education, health, water) women/men, girls/boys
- Access to productive assets (land, credit, vocational training)
- Participation in politics (women/men in elected posts at different levels)
- Inclusion of gender needs in macro policies and processes (e.g. decentralisation)
- Changes in substantive gender issues/gaps in key development sectors (+/–)
- Changes in legislation/policy framework affecting gender equality (+/–)
- Changes in national/sector budget allocation towards gender

MONITORING GENDER IN PROGRAMMES

Key questions and indicators

Gender aware key questions and indicators are needed from the very start of projects/ programmes in order to compare evolutions of the situation of women and men. Formulating gender relevant key questions according to the chosen observation field is an important step. Often, we can observe, count or have a direct answer to the key-question. In that case, no indicator is necessary. If a direct answer to the key question is not possible, only then do we need an indicator, i.e a variable that provides a simple and reliable means to measure – quantitative or qualitative- achievements and/or processes as well as changes in the programme/project or the context.

General macro-indicators (box above) and programme/project relevant indicators should not been confounded. For instance, it is necessary to know, in a HIV/AIDS prevention programme, the prevalence rate at national level. But at programme/project level, other key questions or indicators need to be found out. Often, the beneficiaries know best what is relevant. During a discussion with benefici-ary groups in Uganda, we found out that the number of early pregnancies among young girls is a very good indicator to measure the effectiveness of HIV/AIDS prevention pro-grammes for youth.

Key questions at Country Programme level are detailed in sheet 7. At programme level, the following key questions can be used:

- Do women/men benefit from the pro-gramme in the same way?
- Are some women/men negatively impact-ed by the programme?
- Have gender relations of women/men in the target group changed as a result of the programme? Have gender gaps been reduced?
- Do gender relations challenge working hypotheses and/or influence the efficien-cy/sustainability (+/–)?
- Are new gender issues emerging within the programme?
- Are there new external factors/actors affecting gender besides the programme (+ or –)?
- Are women/men supportive of the pro-gramme or do they wish to change it (partly/totally)? Who? Why? How?

To engender a monitoring system, it is essential to formu-late desegregated key ques-tions and indicators, in order to reflect differences and inequalities between women and men and correct them if necessary. Monitoring is easier if gender is included from the very beginning of a programme/project, e.g. in the logical framework and overall strategy from the start. But efforts must be made to monitor the gender dimension of results at all levels even when/if the original formula-tion and indicators are gen-der blind.

MONITORING GENDER IN PROGRAMMES
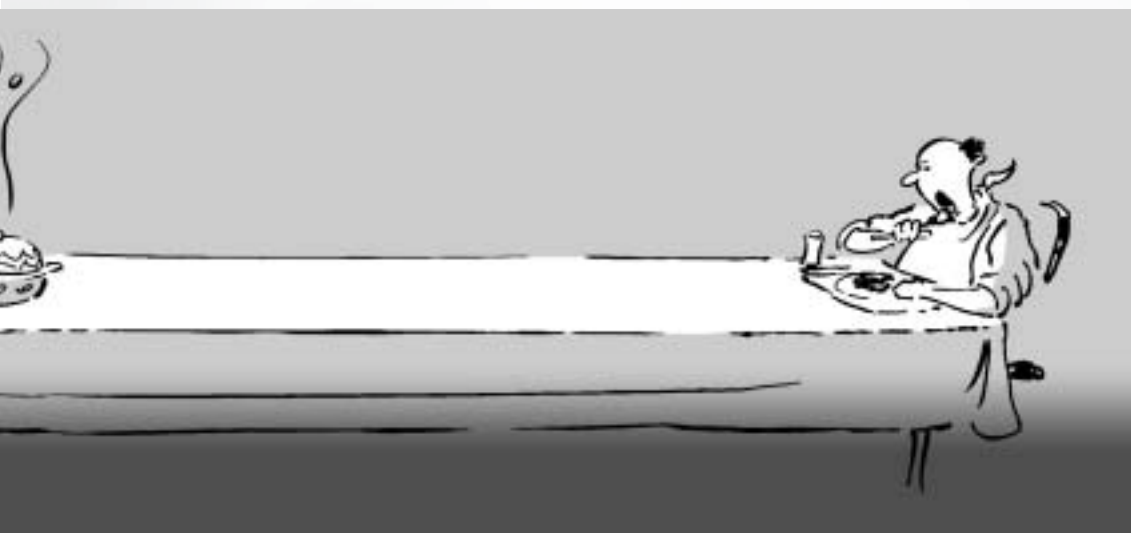
Spheres of responsibility/ influence and monitoring

We can distinguish two main spheres of responsibility or influence for monitoring:

- a sphere of SDC's direct responsibility
- a sphere of influence, partnership, coope- ration and joint action.

Different monitoring matrices are needed to get information at the different levels and different persons will be responsible for collecting the information (e.g. user group level, partner organisations, programme officer, COOF country director).

It is not useful to have long lists of indicators. Data collected and monitoring indicators[2] need to be prioritised:

- What do we need to be able to document at different levels/in different spheres?
- What would we like to be able to document at different levels/in different spheres?
- What would we like to simply discuss between partners (no need to document)?
- Who needs what information?
- Of the information that is needed, which is already collected in monitoring?
- What method is the most appropriate to gather the needed data that is missing?

What can gender indicators measure in the sphere of direct responsibility?

- Quantity/quality of gender competent staff (women/men in SDC/partners)
- Changes to/creation of tools, metho- dologies, procedures to integrate gender
- Initiatives/partnerships to create synergies on gender
- Use/recruitment of gender skilled staff (w/m)
- Changes towards equal opportunities
- Budgets (financial/time) used for mainstreaming in the institution (e.g. % of total budget)

What can gender indicators measure in the sphere of influence?

- Participation (quantity/quality) of women and men in activities
- Access to decision-making by women/men (%, ratio)
- Access to programme resources/ services by women and men (benefits)
- Expected/unexpected outcomes for women/men (compared with objectives)
- Met/unmet gender needs of women and men (compared with expressed needs)
- Changes in gender relations and gender gaps (+/–)
- Capacity (including tools) for SDC and partners to work with gender
- Appropriation of gender by SDC staff, partners, women/men in target groups
- Changes in programme budget alloca- tion towards gender

[2] Adapted from "Outcome Mapping", http://www.idrc.ca/evaluation/ OmsummSheetsFinal.html (dec. 2002)

MONITORING GENDER IN PROGRAMMES

What to do to integrate gender in monitoring…

- Convince yourself, and others, that it is not too late to integrate gender in monitoring, even in programmes that have already started. To begin, it may be sufficient to formulate key questions on gender at different levels.
- Review existing indicators in different spheres. Disaggregate them by gender (women/men of different age, household type, income level, ethnic groups, physical ability, etc.), as relevant, and/or create new ones if needed.

- (Re) formulate clear indicators for the gender mainstreaming strategy and plan how to review its progress as part and parcel of key moments.
- Review monitoring mechanisms (who/how is data collected?) and the use of data (how are gender lessons learned and applied?) in different spheres.
- Allocate clear responsibilities and resources for gendered and gender monitoring.
- Build the capacity of all partners to monitor in a gender aware manner.

In SDC–Tanzania, a gender training identified the need for integrating gender in monitoring. A workshop was held to develop gender tools and indicators for the rural roads and health sectors. This work fed into a parallel process of defining a poverty monitoring framework.

What do we want to know?

(A) In general, both *the communities* and *the project* (SDC) want to know what **difference the project makes** against the initial situation (before the project's interventions). This development focus concentrates on the positive changes, but we also need to check whether the project has unintended, negative effects. Both are necessary to learn whether the approach of the project is appropriate and effective.

(B) More specifically, *the project* (SDC) wants to see **how the project affects specific groups**, what changes it brings to these groups, i.e. the observation of the changes should be socially (poverty-related) and gender disaggregated. This part of the monitoring should provide evidence of the project's achievements related to SDC principles of poverty reduction and gender equality.

How to do it?
A feedback from the poverty and gender-focused monitoring to the community will support the communities in assessing their social interaction, which in turn may enhance development objectives. The monitoring of *outputs* and *results* of the project (e.g. improved roads, improved organisational capacity of community) is part of the implementation management (steering). Responsibility for it is with the *communities*, beneficiaries.

The monitoring of *objectives* and *impact* (e.g. improved accessibility, time saved, opportunity to participate in decisions) is done at longer intervals and is of interest for the beneficiaries and the project. Considering that (a) the monitoring of objectives and impact is likely to be more demanding (e.g. covering project area, define change assumptions) and (b) the project in addition has a poverty and gender focus, the project will be the main agent for this part of the monitoring. *Monitoring framework for poverty, SDC Tanzania, May 2002*

DIFFERENT SPHERES OF RESPONSIBILITY AND INFLUENCE : ENGENDERED MONITORING SYSTEMS OR GENDER MONITORING, KEY QUESTIONS AND INDICATORS ARE ADAPTED TO THOSE LEVELS

Impact analysis focuses on the achievement of long term development goals, progress towards gender equality

At each stage of the programme/ project, sustainability of gender results/benefits should be monitored

SDC's essential sphere to monitor. **Outcome monitoring** focuses on the achievement of the programme objectives (medium term)

In this sphere, but also at other levels, **processes**, strategies, changes in organisations (staff capacities, proce-dures, resources etc.) implemented for mainstreaming gender are monitored

Context monitoring focuses on risks and potentials for the project/ programme, changes which can influence, reinforce or hinder gender equality

Sphere of **beneficiaries groups (SDC's influence)**

Sphere of project/programme **Partnership (SDC's influence)**

Sphere of the project/programme **direct responsibility**

Output monitoring focuses on project/programme immediate delive-ries and partnerships (agreements, contracts, procedures)

Context

Impact

Processes

Outcome

Processes

Output

Processes

Input

To what desired/undesired gender effects did the programme/project contribute?

Have the relevant groups, organisa-tions and individuals to make things change towards more equality between women and men been involved and reached by the pro-gramme?
Did attitudes, practices change?
Have the mutual expectations in the partnership been met?

What are the furthering/hindering processes in the project/ programme to reach the gender objectives?

Are the achieved project/programme results («is») corresponding to the expected gender results («should be»)?
Are the partners committed?

Evaluation is the assessment, as systematic and objective as possible, of an ongoing or completed programme/project, its policy or strategy, its design, implementation and results at different levels. SDC distinguishes several types of evaluation:

■ **Self-evaluation**, also called empowerment evaluation, is a powerful tool to enhance and support programme/project responsible teams and improve the general functioning of complex programmes (multi-levels, multi-partners...)[1]

■ **Reviews or evaluations**, internal or external, lie inside the activities of the staff responsible for programme implementation[2]

■ **Independent evaluations** are evaluations which are initiated and carried out by other persons than the one responsible for a programme[3].

[1] See «Mirror, mirror on the wall...», SDC, 1991 and «Manual on Self-Evaluation», SDC, 1996.
[2] See «External evaluation 1», SDC, June 2000.
[3] See «Guidelines evaluation and controlling» and «English glossary/SDC», SDC, May 2002.

(Self) evaluation can be done prior to action, during it or after completion of the programme/project.

The present sheet is meant for evaluators, self-evaluation facilitators or any person involved in an evaluation action, who are well acquainted with evaluation methodologies and SDC's Programme Cycle Management concept. Its goal is to give some incentives on how to integrate gender and address gender equality issues in a) any general evaluation; b) gender thematic evaluation, i.e. evaluation which is specially designed to evaluate gender equality, gender mainstreaming and women's empowerment efforts.

At present, few general evaluations have comprehensive quantitative and qualitative data about progress made for women and men over the period evaluated[4]. General evaluations are often gender blind. Even when some significant gender disaggregated data has been collected, gender analysis is poor and discussion on gender issues is limited to considering the participation of women. Thematic gender evaluations still focus on women, and men are not present. The word «gender» is used as a synonym of women. Several reasons might explain those weaknesses, such as a) gender blind evaluation methodologies; b) gender blind Terms of Reference (ToR); c) insufficient gender competency and/or commitment among the evaluators; d) lack of gender disaggregated monitoring information.

Efforts have to be made to engender general evaluations in a more consistent way on one hand but it might be important too, in future, to carry out more thematic gender evaluations for learning.

[4] J. Hunt and R. Browers, Review on Gender and Evaluation, submitted to the DAC Working Party on Aid Evaluation, March 2003.

Evaluation methodology

A good gender focused evaluation is first of all a good evaluation. That means that its methodology and used tools integrate gender. At present, there is a need for evaluation capacity building with a strong focus on how to address gender equality issues in evaluation. Training might be necessary for all concerned staff and consultants, including the partners.

The idea is not to treat gender mainstreaming as a goal, but as a means to reach the development objectives of achieving gender equality. It has proven to be useful to find positive/negative gender results of intervention first and then examine the factors/processes that promote good/poor performances. Problems will arise if evaluations are designed based on the assumption that mainstreaming automatically leads to gender equality outcomes. Institutional mainstreaming should not be evaluated without considering the extent to which this leads to changes in gender relations. Focus should be put on results as well as processes and institutional practices.

In any evaluation action, check if:
- Participatory methods of data collection are used, including women and men and with adequate attention to gender issues
- The questions and the indicators are gender-sensitive. This will lead to a higher quality of gender analysis and will tend to include more information on benefits (or no benefits) to women and men
- Besides highlighting women's achievements, focus also on gender relations and on the impact of development activities on gender equality
- Focus on how gender relations may influence women's capacity to participate to or benefit from the programme/project
- Partnerships on gender equality and in other areas have been built
- There is capacity and commitment of involved partners to work on changing gender relations (partner and donor organisations).
- Accountability to gender equality policies and strategies is ensured.

GENDER AND EVALUATION

Terms of reference

Very often, ToR do not include any or, if at all, only vague references to gender. No explicit gender questions are asked. In order to engender them, systematic attention to gender issues should be brought into any evaluation concept and design. SDC staff responsible for preparing the ToR should be gender competent or call in expertise in this field. The collaboration of the Gender Unit to prepare the ToR might help to focus on relevant gender issues and represent a good practice to guarantee that ToR are engendered.

In order to engender evaluation's ToR, check that:

- The gender issues are integrated in the evaluation's objectives
- Precise reference to gender and appropriate evaluation questions to investigate differences in participation, benefits, results at all levels between women and men are included
- The demand to assess the benefits for women and men, the results related to gender equality is explicit
- Institutional approaches and change strategies are included, e.g. furthering factors/obstacles to gender mainstreaming (often interpreted as obstacles to having gender issues addressed)
- The demand to assess changes in gender relations is mentioned
- As far as possible, the demand to make links between the inclusion of a gender perspective and successful or improved programme/project outputs, outcomes or impact is explicit.

Evaluators and evaluation teams

Gender expertise on the evaluators or on the evaluation team is required. Gender competency is today one of the criteria to mandate professional consultants. A good evaluation team is composed of women and men, if possible from the North and from the South. Donors should work towards more joint evaluations (donor/partners, women/men) in line towards sector-wide approaches and increased emphasis on national ownership. Local expertise is indispensable in most of evaluation. The involvement of local evaluators has to be considered as a capacity building exercise. It might require adequate ressourcing and training.

GENDER AND EVALUATION

The choice of an evaluator/evaluation team is essential for the quality of the evaluation. Check that:

- Gender expertise is available in the team
- The team is composed of women and men evaluators
- Local expertise has been used (women and men)
- The evaluators have the capacity to identify and collect gender disaggregated information using a mix of different methods, including the capacity to develop gender sensitive indicators
- The evaluators have the capacity to analyse data collected in relation to the activities being evaluated in a systematic way.

Report writing

Add a sentence about women at the end of a chapter or a chapter about gender is not enough to engender an evaluation report. As ToR and evaluation methodologies, report writing has to be engendered, i.e. conceived and thought from the beginning with a gender perspective.

To write an engendered report and ameliorate its quality in general, check that:

- The way the methodology and used tools have been engendered is explicit
- Sound quantitative and qualitative data about progress made for women and men over the period evaluated (no general remarks unsupported by evidence) is included

- Analysis of these data is consistent
- Recommendations and other comments regarding actions needing to be taken to ensure that gender issues are properly addressed are included.

The way a report is written is important too, as language is not neutral. Words as well as grammar are the mirror of society, in particular of the status that women and men have. Language can evolve and is not bound to immutable academic rules. Rules for engendered writing are language specific.

For report writing, evaluators should check, whatever language is used, that:

- Women and men are equally addressed and are not excluded
- The word «gender» is not taken as a synonym for «women», but highlights the relations between women and men
- No sexist formulation or stereotypes are used
- The way of writing is gender sensitive and respects the rules specific to the used language.

Reviews/Self-evaluation main focus with a gender perspective

Have strategies for building partnerships on gender equality been developed and implemented? With which results?

How have the gender issues been addressed?

Have the links between benefits for women and men, gender analysis, gender mainstreaming efforts and development outputs/outcome been focused on?

Have the expected gender outputs and outcomes been reached (assumptions versus facts)?

Have roles and responsibilities to mainstream gender been defined? Have the contracts been respected?

Do the partners have the capacity to work on changing gender relations?
Is there sufficient commitment from partners and donor organisations?

Is disaggregated data and information available?

Have the gender issues been addressed in the programme/project? Are the objectives engendered? Are they shared by the partners?

Programme/
project context

Sustainability

Relevance

Impact

Effectiveness

Efficiency

Impact

Outcomes

Output

Activitie
&
Processe

Inputs

External/Independent evaluation main focus with a gender perspective

What changes in the context, including gender relations, should be reflected in future interventions?

Has accountability to gender equality strategies been highlighted? Are the programme/ project activities in line with gender policies (national or SDC's gender policy)?

Have the links, at macro-level, between the inclusion of a gender perspective (or not) in design, implementation and programme/project impact, relevance and sustainability been highlighted? To what extent did the engendered development activities improve the achievement of overall results?

Has the role that cooperation development can play in changing gender relations in a given context (social, political, economical) been investigated? Have the links between gender equality and poverty reduction been addressed?

Is the level of involvement of partner agencies sufficient? Is there capacity of changing gender relations? Is there enough ownership? Are gender sensitive stakeholders involved (e.g. women's groups)?

What impact did the programme/project have on gender relations?

Are the development goals engendered? Has gender analysis been undertaken in pre-planning and programme/project planning?

Have the intended/unintended impacts for women and men, for groups been examined?

Relevance

Impact

Effectiveness

Effectiveness

Programme/project context

Impact

Outcomes

Outputs

Activities & Processes

Inputs

GENDER IN MULTILATERAL COOPERATION

SDC plays an active role in numerous inter-governmental bodies of which Switzerland is a member, e.g. UNDP Executive Board, WFP Executive Board, United Nations General Assembly, World Bank Board of Governors, the Regional Development Banks and the cor-responding Development Funds as well as IFAD. SDC officers also frequently participate in international conferences and events at the global, regional and national levels, e.g. major United Nations conferences and Consultative Group meetings. Gender can be included in multilateral work in several ways.

Gender in debates, negotiations and partner institutions

1. Multilateral policies/strategies/resolutions etc.: Do they include an analysis of and take into account women's and men's respective roles, needs and rights as well as inequalities between them?

2. Multilateral programmes/projects:
   - Are gender relations/inequalities reflected in the documents (to the extent possible also in budgets)?
   - Implementation: How are women and men being affected by the activities?

3. Goals/targets/objectives:
   - Are they explicit about the reduction of gender inequalities?
   - Are women's rights implicitly at risk of being jeopardised, e.g. access to health care?

4. Indicators: Are they appropriate to measure the progress of women as well as men?

5. Equal opportunities: Is the multilateral partner institution committed to meeting the goal of gender equality and gender balance?

«... The equal rights and opportunities of women and men must be assured.»
United Nations Millennium Declaration (A/55/2)

GENDER IN MULTILATERAL COOPERATION

Gender in Swiss delegations and contributions

1. Gender-balance in Swiss delegations: Are competent women included in Swiss delegations?

2. Swiss interventions/statements/positions etc.:
   - Are rapid assessments/evaluations undertaken in a gender-sensitive manner?
   - Are gender considerations (see Q8) adequately reflected?

3. Refer to the organisation's own gender policy
   Most of these international organisations have their own gender policies, and sometimes it is simple to refer to the organisation's own policy during negotiations or when making comments on documents and other policies.

«… We share the view of Denmark, Sweden and the USA that UNDP's efforts in support of gender equality are not sufficient. Although we realise that the gender dimension is being mainstreamed … we nevertheless have the impression that the gender dimension is no longer a top priority for UNDP … We would therefore urge UNDP to clearly reconfirm gender equality as strategic priority of the organisation and to redouble its efforts in this respect to advance the status of women. …»
extract from Swiss intervention at UNDP Executive Board Annual Session 2001

«Policies and measures will be pursued in line with the following goals and targets: … (j) Promoting child health and survival and reducing disparities between and within developed and developing countries as quickly as possible, with particular attention to eliminating the pattern of excess and preventable mortality among girl infants and children; …»
Programme for Action for the Least Developed Countries for the Decade 2001–2010 (A/CONF.191/11, para. 38) and reconfirmed in WSSD Plan of Implementation thanks to heavy lobbying on the part of the Swiss delegation

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In Country Offices, Cooperation with multilateral and Bretton Woods Institutions

- In compliance with its status as a member, Switzerland is induced to take a stand on various documents issued by the World Bank. These can comprise strategy documents, e.g. sector strategies, as well as Country Assessment Strategies (CAS's). In determining the Swiss position, the cooperation offices of the countries concerned are contacted and drawn into the process, ever mindful of according due consideration to the aspects relating to the equality of women and men. This holds equally true for the macroeconomic analyses conducted within the framework of the IMF (Article 4 or HIPC).

- In the course of the process leading to the finalisation of a PRSP, while fully aware of the fact that the country concerned is ultimately responsible for the unfolding of this process, those representing Switzerland can utilize their influence to assure that gender aspects be taken into account by invoking the national legal framework, international commitments, and the World Bank's strategy for the equality of men and women.

AWID Young Women and Leadership Programme Toronto, ON (Canada)	http://www.awid.org/index.pl
Bridge, Development Gender Institute of Development Studies (IDS), University of Sussex, Brighton (UK)	http://www.ids.ac.uk/bridge
DAC – OECD Gender Equality Homepage Paris (France)	http://www.oecd.org/oecd/
DPU, Development Planning Unit University College London (UK)	http://www.ucl.ac.uk/dpu/
Gender Information Exchange (genie) Hosted by Bridge at the Institute of Development Studies, University of Sussex, Brighton (UK)	http://www.genie.ids.ac.uk/
IDS/ELDIS guide on Gender and Health documents Hosted by the Institute of Development Studies, University of Sussex, Brighton (UK)	http://www.eldis.org/gender/index.htm
ILO International Labour Organization – Gender Equality Tool Geneva (Switzerland)	http://www.ilo.org/dyn/gender/
IUED Pole genre Genève (Switzerland)	http://www.unige.ch/iued/new/
Syanda – Mainstreaming Gender Equality Hosted by Bridge at the Institute of Development Studies, University of Sussex, Brighton (UK)	http://www.siyanda.org/
UN and Status of Women	http://www.un.org/Conferences/Women/
UN Gateway on Advancement and Empowerment of Women (by DAW, UNIFEM, INSTRAW)	http://www.un.org/womenwatch/
UNDP Gender in Development New York (USA)	http://www.undp.org/gender/ http://www.undp.org/governance/gender.htm
UNESCO, Women and Gender Equality Paris (France)	http://www.unesco.org/women
UNHCR Refugee Women Geneva (Switzerland)	http://www.unhcr.ch/cgi-bin/
UNIFEM United Nations Development Fund for Women New York (USA)	http://www.unifem.org/
UNRISD-United Nations Research Institute for Social Development: Gender Justice, Development and Rights Geneva (Switzerland)	http://www.unrisd.org/
WHO World Health Organisation – Gender Geneva (Switzerland)	http://www.who.int/health_topics/gender/
Women Ink. IWTC New York (USA)	http://iwtc.org/
Worldbank GenderNet Washington, D.C. (USA)	http://worldbank.org/gender/