Understanding gender equality in organisations: A tool for assessment and action

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For most bilateral and multilateral development projects, the counterpart agency has already been decided long before implementation commences. Donor non government organisations (NGOs) also frequently have long-term commitments to counterparts, although the projects and programmes they support with these counterparts may change. Nevertheless, an assessment of counterpart institutional capacity to implement gender-sensitive activities is essential as early as possible in the project cycle, so that an informed judgement can be made of the likelihood of these issues being addressed adequately and appropriately, and so that appropriate strategies for strengthening this capacity can be explored and costed.

International experience shows that donor agencies (both bilateral and NGO) often focus on 'gender training' as the major or only strategy for promoting gender sensitivity and equality within organisations and development programmes. Frequently, training is one-off and is not followed up. Sometimes, it is not linked to agency procedures, tools or specific projects/ programmes, and may not be geared to practical skill development. Training outcomes are generally poorly monitored or not monitored at all. Not surprisingly, progress towards the implementation of gender and development policy remains slow. Gender training is most usefully seen as only one of a number of potential strategies for promoting the implementation of gender equality policies.

Lessons learned about institutional development highlight the importance of the following strategic factors (drawn from BRIDGE 1997, Hamerschlag and Reerink 1996, Hunt 1996, Levy 1996, and Woroniuk et al. 1998; see also Macdonald et al. 1997:136–44).

Strategic areas for institutional development to promote gender equality

Organisational mandate

- Is the mandate for a commitment to gender equality shared and understood within the organisation?
- Does the board of the organisation understand the rationale behind gender and development policy, and is it committed to gender equality? Is the board accountable to an external constituency which cares about this issue?
- Does the board hold the staff of the organisation accountable to policy?

- Does the organisational vision, mission statement and/or constitution acknowledge the power inequalities between women and men?
- Does the mandate for promoting gender equality refer to women's and men's experiences, and gender relations (including the power inequalities that exist between men and women)?
- Is there equal representation of women on the board of the organisation?

Policy on gender and development or gender equality

- Is there a policy on gender and development, gender equality, or women in development, and how was it developed?
- Was the policy imposed?
- Are there processes to build ownership of, commitment to and understanding of policy and its implications by all important stakeholders? Do staff know about the policy or what is in it?
- What is the content of the policy? Does it focus on women's human rights, gender equality and women's strategic interests? Is there an accurate portrayal of the status of women, gender relations and women's experiences, or does the policy have 'idealised' perceptions of women's roles and workloads?
- Are there systems in place to ensure accountability to policy goals and objectives, in organisational structures, procedures and decision making processes? Is there an *operational or strategic plan* to implement the policy with measurable targets and indicators? Are there systems for monitoring progress towards policy implementation, such as consultations on gender equality outcomes, and *regular review and audit* procedures?

Commitment to gender equality

- Does the organisation 'walk its talk' on gender and development policy publicly and privately? Is there a real commitment to reflect on progress in this area and to take steps to improve performance?
- Is there evidence of *senior and middle management commitment* to policy, and responsibility and accountability for gender equality outcomes?

- Is there a code of ethics? If so, does it cover and enforce issues such as domestic violence and sexual harassment?
- When was a commitment to gender equality taken on? Has this commitment resulted in any review of policies, programmes and personnel management practices?

Organisational structure

- Is there a gender desk, unit or focal point which is responsible for ensuring that gender equality policy is implemented? If not, who is responsible for ensuring that gender issues are adequately addressed, and do they have the capacity and support to do this?
- If there is a gender focal point, where is this unit/ desk located within the organisation? Is it strategically located, with clear links to senior management and with field/programme work? Does this unit/desk have authority and are the staff of the gender focal point respected?
- Do staff responsible for implementing gender policy have gender and development expertise? Are they adequately resourced within the organisation, or are they expected to carry out their gender and development responsibilities in their spare time, along with their normal duties?
- How are gender issues mainstreamed: is there acknowledgement that every staff member shares a responsibility to promote gender equality and implement policy? Are gender focal points seen as a valuable source of support and expertise; or is every matter concerning women seen as their responsibility and no one else's?
- Do organisational policy making, decision making and communication procedures provide opportunities for all members to participate?

Programmes, projects, activities and procedures

- Who benefits from the programmes, projects and activities carried out? Does reality match rhetoric about who benefits? Does the organisation know the impact of its activities and how this may differ for women and men?
- Is there an understanding of what gender analysis means? Are there appropriate tools for assessing who benefits from programmes, projects and activities (linked to organisational procedures)? (The development of gender analysis tools should build ownership, understanding and commitment to use tools as aids for *analysis*, rather than as 'checklists' or for 'ticking boxes'.)
- Is there mandatory or voluntary project screening or appraisal of programmes and projects? Are there sex-disaggregated data which show how women and men benefit?

- Is there an understanding of what authentic (versus tokenistic) mainstreaming means? Do women still only feature in 'women-only' projects?
- Does the organisation monitor and evaluate the impact of its activities on women and men and on gender relations? (Do organisational procedures facilitate/ensure that this happens?)
- Do activities focus on women's practical needs only or do they support women to define and meet their strategic interests, by challenging traditional perceptions, roles and responsibilities?

Building capacity: A learning organisation?

- Does the organisation have systems and processes for sharing lessons and good practice, from within the organisation and externally?
- Is good practice on addressing gender issues recognised or rewarded?
- Are formal and non-formal training opportunities provided for women, such as assertiveness, conflict resolution and leadership training?
- Do staff have the skills to undertake gender analysis of their programmes, projects and activities? Are they resourced, supported and encouraged to gain these skills?
- Is 'gender training' practical and linked to agency policy, mandate, procedures and programmes? Is training followed up to ensure that participants apply their skills and learning? Is gender training provided within a human rights perspective?

Personnel management practices

- Are equal employment opportunity and affirmative action principles and policies in place and applied in recruitment and personnel management?
- Do recruitment procedures identify gender equality commitment and gender analysis skills as essential or desirable criteria where appropriate?
- Is the promotion of gender equality and responsibility for gender equality outcomes included in duty statements?
- Do performance appraisal processes include an assessment of gender and development competence and identify strategies for improving staff capacity?
- Does the organisation have a sex-disaggregated employment profile? (See notes on this below.)
- Does the organisation have family-friendly work practices and policies, such as flexible working arrangements, maternal and paternal leave entitlements, and childcare and dependent care leave and support?
- Are sexual harassment policies and procedures in place and applied?

Organisational culture

Each of the above factors will have an impact on organisational culture, which also draws directly from the social and cultural context.

- Does the organisation have strategies for dealing with opposition and resistance to gender equality policy and programmes? Some possible strategies are:
  - harnessing political support and forming alliances within the organisation and country, and externally, to address resistance;
  - ensuring that the mandate for gender equality policy and programmes is clear, that it draws on a commitment to human rights, on women's and men's voices and experiences, and on sound and accurate gender analysis;
  - using informal and formal leaders as role models for gender-sensitive practice;
  - engaging in discussion and debate within the organisation on gender issues, to provide people with informal opportunities for learning and exposure to diverse views;
  - reinforcing the implications of policy, ensuring that it is seen as mandatory rather than optional and stressing accountability for implementing policy.
- The empowerment of women within organisations is critical for changing male-dominated cultures.
- Strength, commitment and credibility of gender focal points and senior management is also crucial for changing organisational culture.

Organisational context

- Does the government have a policy on women in development or gender and development, in national or sectoral planning documents? Is there a 'women's plan' that can be referred to, to encourage change within the organisation (such as commitments made at the Beijing Fourth World Conference on Women in 1995)?
- Is there a 'national women's machinery', such as a ministry of women's affairs, department or office, or national or provincial NGOs or councils that can be referred to, to encourage change?
- What other agencies or organisations are active in the sector or country on gender and development, and what is their approach to gender issues?

A sex-disaggregated employment profile

AusAID's *Guide to gender and development* (1998:21) notes the importance of undertaking a sex-disaggregated employment profile in assessing counterpart agency capacity to implement gender-sensitive projects. The following are some issues to consider:

- Numbers of female and male staff according to seniority; occupation/role; management versus field positions (particularly in the project location); educational attainment; and access to training opportunities. It is important to assess whether women are marginalised into particular roles, and why. (For example, secretarial, nutrition or home economics for agricultural agencies; desk-based positions for police departments).
- Are there systems in place to monitor how men and women progress through the organisation, and to reflect on blocks to progress and develop strategies to address these blocks (so that women are encouraged to move into middle and senior levels in the organisation)?
- Approaches to gender issues in other projects and regions, for example recruitment of female staff, training of female staff, gender targeting of beneficiaries, awareness of impact on women.
- Levels of expertise regarding women's roles in the sector, in terms of gender division of labour, access to and control over resources, approaches to planning for women (welfare-oriented, effectiveness concerns or equality). Locate sources of expertise within the agency.
- Communication strategies, and capacity for and commitment to participatory and consultative approaches to project implementation.
- Receptiveness to, knowledge or understanding of their own government's and AusAID's gender and development policy, and to different rationales for working with women (effectiveness, need, equality, sustainability).

Strengthening organisational capacity

These are tips only and are not comprehensive. Strategies need to be developed to suit the organisational and project context. In some cases, the best place to start may be with strategic planning to develop or review policy, or to ensure that there is a debate and shared understanding of policy. In others, strategic planning to implement policy may be a good starting-point.

Personnel management

- Identify female staff who can be involved in planning and implementation of the project, and cost any specific measures needed to support their ongoing participation and involvement in project decision making.
- Set targets and devise strategies for the recruitment of female staff.
- Resource female field staff adequately and monitor the use of these resources.
- Actively monitor barriers to female participation within the agency and develop appropriate

strategies for overcoming these barriers. For example, ensure that adequate and safe transport and housing is available and take into account women's family responsibilities.

- Monitor the tendency for female staff to be marginalised to administrative or 'traditional female' roles.

Training

- Provide project focused and practical gender training for expatriate and local staff, which directly addresses women's and men's roles and responsibilities in the sector, their access to resources and their priorities for production and consumption, and project-specific strategies for addressing gender issues.
- Provide bridging training for female staff.
- Ensure that training and responsibilities for female and male staff are equivalent.
- Set targets for female participation in all areas of training, and outline how targets will be met.
- Identify women eligible for management, research and other higher level training.
- Monitor and report on progress in meeting training targets.

In a World Bank funded agricultural extension project in Cameroon (Walker 1990), significant increases were achieved in the recruitment of female staff, in staff training and in the adaptation of extension methods to reach women farmers. Strategies used included:

- equivalent intensive training for all recruits, including rural sociology and farming systems;
- using contact groups in addition to contact farmers, including existing formal and informal women's groups;
- selecting 'leader farmers', half of whom were women, to provide demonstration fields;
- providing credit for both cash and food crops (men's and women's crops);
- gender targeting, where groups were initially and temporarily contacted by extension agents of the same gender;
- monitoring of gender impact, which saw the project evolve from neglect of women, to segregated activities, to a hybrid approach of both integrated activities and special women's focus.

Participation and consultation strategies

- Review communication strategies to ensure that women know of the project and have realistic opportunities for participation.
- Where necessary, organise or support separate groups of men and women as vehicles for communication with the project. If separate groups are not appropriate, monitor women's participation in mixed groups.
- Identify local formal and informal women's groups which could act as channels for communication and participation, and monitor membership and access to resources through these groups.
- Ensure that the scheduling of project activities (daily and seasonal), particularly opportunities for participation and consultation, do not clash with women's highest priority tasks.
- Actively monitor barriers to female participation in the project and develop appropriate strategies for overcoming these barriers.

Negotiation

- Use rationales for gender-sensitive approaches which will appeal to hostile or indifferent staff in counterpart agencies, such as efficiency, effectiveness and sustainability concerns.
- Demonstrate the economic benefits of involving and supporting women, both female staff and in the community. Demonstrate the costs of neglecting women.
- Draw on local government's statements/rationales for involving and supporting women and men in development planning and implementation.
- Identify in-country advocates for gender-sensitive approaches, and possible networks to support key women in the counterpart agency.

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