



Overview

Development planning and gender planning converge in their goals. Planning needs to be informed by a gender analysis that seeks to address the root causes of gender-based inequalities. Gender planning should therefore not be seen as a separate, parallel process to national development planning. It should transform mainstream development planning to address gender-based inequalities generally through an economically, socially and environmentally sustainable process. The *Gender Mainstreaming in Development Planning* manual provides an overview of approaches to development and development planning and ways of developing gender-aware policy and planning. It suggests tools for integrating gender into macroeconomic policy.

What's in this module?

This core module offers general activities introducing development approaches and frameworks (3.1 'Development warm-up' and 3.2 'Approaches to development planning') and sessions that apply the GMS to development planning (3.3 'Applying the GMS to development planning' and 3.4 'Mainstreaming gender in planning cycles'). Finally there is an exercise to compare experiences in South Africa with participants' national contexts (3.5 'Lessons from South Africa').

Checklist

- Make sure you are familiar with the contents of the *GMS Handbook* before you start to deliver the training activities in this module.
- The Toolkit Action Guide Unit 6 'GMS mechanisms: planning' will give you an overview and help you find out what's in the manual and where, and which sections will be most useful.
- Look through the 'To help you choose' table in the Introduction to this Trainer's Guide for activities, topics, methods and handouts from other modules and sectors that you can adapt to fit your purposes.
- Always start planning your training with an analysis of your learners and their needs.
- Use the 'How to' briefings in the Introduction to this Trainer's Guide to help you design your training.

Background

Make sure too that you are familiar with the issues for your sector by working through the Toolkit Action Guide Unit 4 'Using the sector manuals' and your relevant sector manual(s).

ACTIVITY 3.1

Development warm-up

Aim To get the group thinking about development definitions and approaches

Outcomes

- Compare and analyse development definitions and statements
- Agree on elements of development approaches likely to promote gender equality

Time 25-30 mins

Materials Definitions of development on flipcharts and Handout 3.1, prepared flipcharts with 'positive' and 'negative' columns

Steps

- 1 Explain that the aim of this activity is to think about development and agree on some basic elements that are important for gender equality.
- 2 Tell participants that you're going to read out four different statements about development, which are written on flipcharts placed in the four corners of the room. After listening to them, they will choose the definition they most agree with, and go to stand by the flipchart it is written on. They will have three minutes to discuss with others who have gone to the same flipchart the following questions:
 - What are the most important positive aspects of this definition?
 - What key words best express these aspects?One person from each group calls out the words. Write the words on flipcharts under the 'positive' column. (10 mins)
- 3 Ask the groups to select the most important problems with the definition, and to call out the key words that best express them. Write these on the flipchart under the 'negative' column. (5 mins)
- 4 Now ask each group to change places with the group diagonally opposite them. Ask each group to call out any key words additional to those already on the flipchart that express why this definition is or is not most likely to apply to women and men equally. (5 mins)
- 5 Have a short 'stand up meeting' on whether certain kinds of development approaches are more likely to achieve gender equity, and what the key elements of these would be. Note these on flipchart. Give participants copies of Handout 3.1 (5-10 mins)

Notes

- Some definitions and statements about development are provided in Handout 3.1. You can use others, but make sure you have contrasting statements. Avoid using one that is obviously the most comprehensive, or all the participants will end up there and there won't be a discussion.
- Place the definitions that most contrast with each other in opposite corners of the room.
- This is an energising, light activity to start a day or session.



Statements about development

HANDOUT
3.1

- A Development is people centred, participatory and environmentally sound. It involves not just economic growth, but equitable distribution, enhancement of people's capabilities and widening of their choices. (UNHCHR website)
- B The new growth theory stresses the importance of a market economy, but also notes the importance of the government in promoting economic development through investments in human and social capital and knowledge industries (communications, computers). It can be seen as the first step in creating a development theory that notes the importance of both economic and cultural factors.
- C Poverty reduction is the heart of the Bank's mission. (Wolfensohn, World Bank President, press statement)
- D If development doesn't work for women, it doesn't work. (Adapted from ITDG)
- E Development is about the process of transforming lives and transforming societies. (Oxfam Handbook of Development and Relief)

ACTIVITY 3.2

Approaches to development planning

Aim To introduce some of the basic concepts in gender planning and analysis

Outcomes

- Identify the most widely used analytical frameworks for development planning, and related concepts
- Practise applying the Moser framework

Time 1 3/4 hrs

Materials Prepared Handouts 3.2a, 3.2b, 3.2c, 3.2d and 3.2e, OHP, flipcharts and pens

Steps

- 1 Explain the aim of the session. It will cover the basic analytical concepts used in planning from a gender equality perspective. Tell participants that there are a number of analytical frameworks used for gender planning in different contexts. In this session they will be introduced to some of the most widely used ones, and they will practise using one of them.
- 2 Go through the table on Handout 3.2a 'Concepts chart' as an OHP. Explain the concepts where they are not clear to the group. Ask participants from the group to volunteer explanations wherever possible. (10 mins)
- 3 Go briefly through Handout 3.2b 'Frameworks chart'. Explain that in this activity they will be using the Moser framework, though some concepts from other frameworks will be incorporated (e.g. access and control from the Harvard framework). (10 mins)
- 4 Go through the basic elements of Moser's Framework of Gender Planning. Use an OHP slide of Handout 3.2c 'Roles and needs'. (10 mins)
- 5 Give each participant a copy of Handout 3.2c 'Roles and needs', and Handout 3.2d 'Case studies'. Divide participants into groups of three or four, and ask them to apply the roles and needs table to the case studies, noting how women's roles are recognised and their needs met in the examples. (15 mins)
- 6 Bring the groups back together. Take feedback on whether they had any problems with this task, and go through some of uses and limitations of the Moser categories of roles and needs. (5-10 mins)
- 7 Give a brief input on WID and GAD policy approaches. Go through the welfare, anti-poverty, efficiency, equity and empowerment/transformation approaches and what they stand for. (10 mins)
- 8 Give out Handout 3.2e 'Approaches' to each participant. Ask people to read through the table individually. (5 mins)
- 9 Divide the group into two smaller groups. Each group will copy the chart from Handout 3.2e 'Approaches' onto flipchart paper, leaving the columns blank. They then fill in the columns from the perspective of their national development policies, or their sectoral or institutional policies on development. They should note at the bottom of the chart where the main information gaps are. When they have finished, they should put their charts up on the wall. They will be referred to later in the training. (30 mins)



ACTIVITY 3.2

Notes:

- There is a lot of material to get through in this session, especially if the concepts are new to participants. You may want to break it into two. For example, you could have a coffee break in the middle, during which participants look at Handout 3.2e 'Approaches'.
- Depending on your group, you could ask participants to come to the session with their national development plan or other policy document, so they have more information to work with.
- It is important to talk about the limitations of the strategic/practical needs and triple role analytical concepts, as well as their uses. Offer ways in which they could be extended – for example, by looking at the transformatory or strategic potential in practical interventions.
- Draw on the briefings on key concepts and frameworks at the beginning of this Trainer's Guide

HANDOUT
3.2a

Concepts chart

CONCEPT	WHAT DOES IT MEAN?
Sex/gender	Basic dichotomy in analysis of male/female differences.
Sex	The biological differences between women and men. People are born female or male, with different bodies and different chemistry.
Gender	The socially constructed differences between women and men. Babies are born girls and boys who learn how they are expected to think and behave as women and men. This differs from one culture and society to another, changes over time and – crucially – defines who has power and influence over what.
Gender relations	The social relationships between women and men that reflect and reproduce gender difference as constructed in a particular context, society and time. They express differentiated power, rights, responsibilities and values. Gender relations intersect with other social relations based on age, class, ethnicity, race, sexuality and disability.
Sex disaggregation	Identifying and highlighting the differences for women and men in all aspects of life. It is particularly important for understanding gender differences within units of analysis such as 'household', 'family', 'community' and 'nation'.
Gender analysis	Is based on sex-disaggregated data, and the accounts of women and men. It goes further to examine why the observed differences exist. It explores the history, mechanisms, dynamics and effects of gender relations. It examines the structural causes of gender inequalities from the household to the nation state, making links between these levels, and uncovering resulting sex discrimination in access to rights, power and resources.
Gender division of labour	The work, tasks, roles and responsibilities assigned to women and men on the basis of their gender identity. In the majority of societies, men's work is more highly valued than women's work. Much of women's work is unpaid and unrecognised.
Women's triple role	Moser identified three categories of women's work: reproductive (care and maintenance of the household and all its members); productive (production of goods and services for consumption and trade); and community-based (organisation and management of collective events, services and politics). Men share the last two, but rarely the first, which in most societies is not considered as work.
Access and control	Access to resources means being able to use them; control over resources means deciding who may use them, and how. Part of the Harvard Gender Framework Analysis (GFA).
Condition and position	Used to differentiate between the material circumstances, or conditions, in which women and men live, and the position or status women and men hold in society.



HANDOUT
3.2a

CONCEPT	WHAT DOES IT MEAN?
Practical and strategic gender needs and interests	<p>Practical gender needs arise from the different material conditions of women and men; they reflect women's subordinate position in society but do not include challenging it.</p> <p>Strategic gender needs of women and men arise from their position, status and power. Women's strategic gender needs may include ownership rights to land, challenging the gender balance of power and control to achieve gender equality.</p> <p>The concept of practical and strategic gender needs as planning tools was developed by Moser as a way of expressing the different experience and expectations of women and men. In practice, the distinction between practical and strategic is not always clear-cut. A practical gender need for women may be a water source nearer to home, but this could also free time for women to access skills training – a strategic interest.</p>
WID/GAD policy approaches	<p>Women in Development (WID) and Gender and Development (GAD) refer to two essentially different approaches to development.</p> <p>WID is based on the assumption that women are 'left out' of development, and need special projects to 'integrate' them. Gender relations and power inequalities are not addressed, and women's participation is often passive.</p> <p>GAD is based on gender analysis and sees gender equality as a fundamental development goal, with women's empowerment and agency as key features of development strategy.</p>
Gender mainstreaming	<p>A strategy first articulated by ECOSOC in 1997 with GAD goals and a commitment to gender equality in all aspects of policy and programme design and implementation. Its aim is to transform the 'mainstream' at all levels to end gender discrimination. When transformation of gender relations is not part of the agenda, mainstreaming can be a WID strategy in disguise, in which gender issues are 'mainstreamed' to the point of invisibility.</p>
Types of gender policy	<p>Gender-blind – ignores the different socially determined roles, responsibilities and capabilities of men and women. It is based on information derived from men's activities and/or assumes those affected by the policy have the same (male) needs and interests.</p> <p>Gender-neutral – is not specifically aimed at either men or women and is assumed to affect both sexes equally. However, it may actually be gender-blind (see above).</p> <p>Gender-specific – recognises gender differences and targets either men or women, within existing roles and responsibilities.</p> <p>Gender-redistributive – seeks to change the distribution of power and resources in the interests of gender equality.</p>
Gender balance	<p>Equal or fair distribution of women and men within an institution or group, giving equality of representation.</p>
Gender equality and equity	<p>These concepts are not the same, although often used interchangeably. Equality is rights-based. Women and men have equal rights, enshrined in international standards and treaties. Equality does not mean sameness in identity; it means the same entitlements and opportunities.</p> <p>Equity means justice so that resources are fairly distributed, taking into account the different needs of women and men, girls and boys. It is best used linked clearly to rights, as an outcome of gender equality.</p>

HANDOUT
3.2b

Frameworks chart: Some strengths and weaknesses of the Moser, Harvard, Longwe and Social Relations Frameworks

FRAMEWORK ELEMENTS	STRENGTHS	WEAKNESSES
<p>Moser Framework of Gender Planning</p> <ul style="list-style-type: none"> - triple role - strategic and practical needs - policy approaches 	<p>Regarded as simple to use Can be used at all levels Elements used for awareness-raising as well as planning Challenges inequalities Captures all of women's work Uses concept of strategic needs to change gender relations Examines policy assumptions</p>	<p>'Needs' language can make planning top-down, beneficiaries seem passive Triple role, practical and strategic distinctions not always clear Leads to separate pictures of women and men Change over time not included</p>
<p>Harvard Gender Analysis Framework</p> <ul style="list-style-type: none"> - activities profile - access and control of resources and benefits - influencing factors - checklist 	<p>Practical and hands-on Good for data collection Best at project level as requires micro-level analysis and detailed information Clear picture of division of labour makes women's work visible Uncontroversial as based on facts, thus good entry point for planners</p>	<p>Does not address gender relations or power Leads to separate pictures of women and men Can lead to top-down, superficial information if not used in participatory way Change over time not included</p>
<p>Longwe Empowerment Framework</p> <ul style="list-style-type: none"> - five rising levels of equality (welfare, access, conscientisation, participation, control) - levels of recognition of women's issues (negative, neutral, positive) 	<p>Use at all stages of project cycle to look at transformatory potential of interventions Focuses on empowerment and equality as goals Enables analysis of levels of women's empowerment Useful as a tool kit of concepts Sees practical to strategic as a progression rather than discrete categories</p>	<p>Deals in broad generalities only Hierarchy of levels of empowerment does not include types of resources and their relative importance Gender relations seen only in terms of equality, leaves out other complex aspects Empowerment focus can lead to women-only focus Change over time not included</p>
<p>IDS Social Relations Framework</p> <ul style="list-style-type: none"> - social relations - institutions (state, market, community, family/kinship) - structural cause analysis 	<p>Use at all levels, for policy and planning Focus on institutions means organisations must examine themselves Holistic poverty analysis through taking into account cross-cutting inequalities e.g. race, class, etc. Highlights gender relations Shows change over time</p>	<p>Complicated to use Gender can get lost in other categories of analysis Unsuitable for participatory community-level use Focus on institutions downplays individual agency May be hard to agree clear definition of institution</p>

(Adapted from March et al, 1999.)



Roles and needs

HANDOUT
3.2c

Type of intervention	Women's role recognised			Gender need met	
	Reproductive	Productive	Community management	Practical	Strategic
1 Employment policy					
(i) Skill training					
Cooking	◆			◆	
Dressmaking		◆		◆	
Masonry/carpentry		◆		◆	◆
(ii) Access to credit					
Allocated to household		◆		◆	
Allocated to women		◆		◆	◆
2 Human settlement policy					
(i) Zoning legislation					
Separates residence and work	◆				
Does not separate residence and work	◆	◆		◆	
(iii) House ownership					
In man's name	◆			◆	
In woman's name	◆	◆		◆	◆
3 Basic services					
(i) Location of nursery					
Located in community	◆	◆	◆	◆	
Mother's workplace	◆	◆		◆	
Father's workplace	◆	◆		◆	◆
(ii) Transport services					
Only peak-hour bus service		◆		◆	
Adequate off-peak service	◆	◆	◆	◆	
(iii) Timing of rural extension meetings					
In the morning		◆		◆	
In the afternoon/evening	◆	◆	◆	◆	

HANDOUT
3.2d

Case studies

- 1 **Cash for work in Bangladesh.** In 2000, Western Bangladesh suffered severe flooding, affecting an estimated 3.3 million people. The most vulnerable households were those dependent on daily wage labour, and Oxfam's response included a cash-for-work programme, offering 10,000 people 30 days' paid work. Eighty per cent of those involved in the programme were women. Women reported having to get up earlier to do the household work in order to work for the programme, but felt it was worth it for the status they gained in the community through earning an income. They spent their money on food, schoolbooks and school fees, clothes, fertiliser, to repay loans and save for future needs, or livestock. (Adapted from Khogali and Takhar, 2001)
- 2 **Production workshops in Colombia.** Support in the form of machinery, production and management skills is being provided to a network of women-owned and managed production workshops in a Colombian city. Nine independent groups of 25-35 women, working in small factory locations, are producing footwear and clothing on a contract or outworker basis for large companies that export the finished products. All materials are provided to the production groups. Although the women enjoy organising their own day-to-day work, orders are neither guaranteed nor regular and there is a constant struggle to ensure a continuous flow of work and income. (From Commonwealth Youth Programme, 1998)
- 3 **The Kosovo Women's Initiative.** After Kosovan refugees returned home in 2000, there was a great deal of money available for projects promoting Kosovan women. As part of it, a number of income-generating projects were funded, from bee-keeping to sewing, embroidery and other small crafts, but the markets for these products were almost non-existent. However, the projects gave women the opportunity to meet and recover from the trauma of the conflict, and sometimes raise the issue of domestic violence, a taboo subject for most women. (Oxfam)



Approaches

A typology of government attempts to engender development planning

HANDOUT

3.2e

Policy approach	Role of the state	Type of development	Planning data	Women's role in decision-making	Macroeconomic framework	Integration of gender in planning	Distribution of resources	Impact on gender inequalities
<p>Welfare It is seen as a safety net to cushion the negative impact of the 'free market' on the lives of poor people. Locate women in family.</p>	<p>Limited role. Only acts when there is extreme pressure. Then promotes an incremental, piecemeal response to address symptoms through sectors.</p>	<p>Based on promoting accelerated economic growth through industrialisation. Limited emphasis on building human resources except in respect of skills for the market.</p>	<p>Limited to socio-economic indicators with human development index (HDI) more recently. Little information on gender. Not much sectoral information except in the health sector.</p>	<p>Limited marginal role. Medium to high part in community managing and in household. Participation in meeting practical needs through projects.</p>	<p>Emphasis on reducing deficits, cutting back on public expenditure, especially on social services. Repayment of debt and servicing. Women seen as dependants.</p>	<p>No efforts made. Gender seen as women's responsibility through welfare departments.</p>	<p>Limited funding. High reliance on donor aid for self-help projects. Tax incentives for private sector to assist with poverty alleviation through social responsibility.</p>	<p>No impact. Some practical needs met. Women seen as passive recipients of welfare. Their only recognised roles are reproduction and community management.</p>
<p>Anti-poverty Promotes the thinking that helping poor women will increase their productivity and promote economic growth. Poverty is seen as the problem due to underdevelopment – not unequal power relations.</p>	<p>Role seen only as co-ordination through nation-wide anti-poverty campaigns. Emphasis on improving women as 'vehicles of development' not in their own right.</p>	<p>Neglect of rural economy. Modernising economy and promoting small-scale businesses and income generating products. Emphasis on employing women in certain sectors such as the service industry/craft. Trickle down effect of economic growth to benefit women.</p>	<p>Central Statistical Services (CSS) provide national data. Emphasis on socio-economic indices and HDI. Data obtained only in respect of numbers of women.</p>	<p>Not promoted. Limited to women's organisations and projects. Only evident in projects and NGOs.</p>	<p>Same as welfare except emphasis on donor support and funds to address poverty. Introduction of public works programmes. Emphasis on role of the poor in informal economy as survival strategy.</p>	<p>Not evident in Commonwealth governments except through women's units in welfare departments and rural development strategies.</p>	<p>Funding through loans and grants available for anti-poverty programmes. Donor and private sector support provided for small income generating projects.</p>	<p>Limited to only meeting practical gender needs (basic needs) but often not very successfully.</p>

HANDOUT
3.2e

Policy approach	Role of the state	Type of development	Planning data	Women's role in decision-making	Macroeconomic framework	Integration of gender in planning	Distribution of resources	Impact on gender inequalities
<p>Efficiency Recent approach. Acceptance that because of changing global arrangements women's production role as cheap labour is critical to economic development. Thinking women can help to make the system work better.</p>	<p>Promotes private sector involvement in employment of women. Promotes policy of equal opportunities not equality of conditions. Does not interfere in regulating market but emphasis is on labour policies and skills development.</p>	<p>Economic development and faster growth through human resource capacity-building. Emphasis on vocational skills and training unemployed.</p>	<p>CSS obtain data with emphasis on HDI, levels of literacy, etc. Economic indices and human resources. Breakdown information on female 'dropouts' from school etc.</p>	<p>Increase numbers of women in economic activity. Emphasis on local self-management uses women to carry out tasks.</p>	<p>Emphasis on efficient management of economy, increased productivity, investments from domestic and foreign capital. Trade liberalisation, lowering deficit and taxes, increasing education and health budgets, promoting domestic savings.</p>	<p>No structural changes. Integration through sectoral programme/project plans especially in education health and welfare of women's units.</p>	<p>Funds for sectors through national budgets – health, education and unemployment programmes. Donor support small business and income generating projects of women. Support training projects, especially for women.</p>	<p>Greater visibility of women in productive roles. Increases women's alienation, exploitation and burden of multiple roles, preventing them from using increased participation to change decision-making structures. Structural inequalities remain.</p>
<p>Equity Promotes recognition of women's contribution to development (waged and unpaid) and fair treatment because of its value.</p>	<p>Regulatory role high. State provides legal framework for fair treatment of women especially in political and economic sphere.</p>	<p>Based on increased state regulation by the economic sector and active state intervention. State led economic growth through modernisation.</p>	<p>General statistical data relevant to HDI and economic indices of development. Emphasis on sex-disaggregated data to show gender inequities.</p>	<p>Promote increased role. See women as already in decision-making structures but in need of recognition.</p>	<p>Increased deficits. Investment in public enterprises. High taxes on corporations. Public service and social expenditure high. States affected by structural adjustment programmes (SAPs).</p>	<p>Non-existent in community. Would be high if it took off. But state power usually means male domination.</p>	<p>Using an equity approach has some potential in respect of gender but on its own it cannot address systemic problems of inequality.</p>	



HANDOUT
3.2e

Policy approach	Role of the state	Type of development	Planning data	Women's role in decision-making	Macroeconomic framework	Integration of gender in planning	Distribution of resources	Impact on gender inequalities
<p>Empowerment/Transformation</p> <p>By raising gender awareness and a critical analysis of social and structural problems through mass based popular development education, poor women and men would become empowered and enabled to use democratic space to change or engage in a process of transforming oppressive structures, policies and programmes. Process to lead to economic, political, social, empowerment of women.</p>	<p>Significant role in promoting rights of women and poor people. Important role in ensuring democratic practices and promoting a critical partnership between organisations of civil society. Enforcement of human rights and protocols for workers' rights.</p>	<p>Integrated, sustainable. Promoting economic growth and redistribution. Emphasis on limiting monopolies promoting rural and urban development. Increased role of NGOs and CSOs in development process.</p>	<p>Change national census process. All data to be broken down in terms of gender, race and other categories. Both social and economic indicators. Push for new indices to measure women's work and its value.</p>	<p>Promoted at all levels. Not only in terms of increased numbers but assisting through training to help women make informed decisions and through participation to change quality of decision-making and its processes.</p>	<p>Emphasis on meeting fundamental human needs through state social and economic goals. Increasing consumption. Deficits not seen as important. Increased taxation. Greater participation of the poor in economy. Promotion of social market – mixed economy approach. Increased labour intensive employment strategies.</p>	<p>New structures and policies required. Gender to be included and integrated into development planning.</p>	<p>Public funds used to bring about land reform, restitution and agricultural development. Increases in social service budgets, efficient public sector with public enterprises to show profit. Donor grants for restructuring governance. Training and education of women not widely accepted.</p>	<p>Potential impact to address strategic gender needs great. But not accepted by mainstream development agencies. Promoted through progressive women's movements.</p>

ACTIVITY 3.3

Applying the GMS to development planning

Aim To explore how the GMS can help to bring about engendered and co-ordinated development planning

Outcomes

- Identify issues for development planning of elements of the GMS (enabling environment, structures and mechanisms, and processes)
- Draw up action points relevant to gender mainstreaming and development planning

Time 1 – 1 1/2 hrs

Materials Flipcharts, pens, paper, Handouts 1.1c and 1.3a (from Activity 1.1 in this Trainer's Guide) and Handout 3.3

Steps

- 1 Review the GMS introductory activity (Activity 1.1 in this Trainer's Guide) if you have already done it with the group. If not, work through it now. (30 mins)
- 2 Give participants Handout 1.1c 'GMS diagram' and Handout 1.3 'Establishing a GMS'. Tell them they will work in three groups to examine the elements of the GMS and identify issues relevant for development planning. One group will look at the enabling environment; the second will look at structures and mechanisms; and the third will look at GMS processes, focusing mainly on gender issues in sectoral ministries. Allow the groups to self-select, making sure they are roughly the same size.
- 3 Ask the groups to:
 - Consider the positive, enabling factors of each element of the GMS they are looking at, and the risk factors or obstacles to advancing gender equity and equality in development planning. They can express this as force-field or SWOT analysis (strengths/weaknesses/opportunities/threats).
 - Consider the 'levers' of the GMS in terms of how they could be used.
 - Come up with some action points for each element.
 - Examples of questions they could ask:
 - Does their government or ministry adopt a WID or a GAD approach?
 - Is the development agenda driven by macroeconomic growth or social goals?
 - Is there any structure for leadership on gender, and co-ordination between different sectors or ministries on gender?
 - Are there effective gender analysis, monitoring, evaluation and staff accountability systems in place?

Give Group 3, the GMS processes group, copies of Handout 3.3 'Gender issues in sectoral ministries'. Ask them to focus on gender issues common to all the ministries, and co-ordinated planning. (30-40 mins)

- 4 Back in the plenary, each group feeds back for five or six minutes on their action points, and ways they think the GMS could help ensure that gender is mainstreamed in development planning. (20 mins)
- 5 Note the action points on flipchart, and wrap up.

Notes

- If the group has not worked through Module 1 on the GMS in detail, you may need to prompt them, using material from sections 3, 4 and 5 of the *GMS Handbook* about the GMS model.
- Refer to the Executive Summary and Section 3 of the *Development Planning* manual for action points relevant to this activity.



Gender issues in sectoral ministries

HANDOUT

3.3

	Issues
Finance	Points of entry for gender mainstreaming in the finance sector include: ongoing macroeconomic management, including the annual budget cycle, the fiscal deficit, external and internal debt, and the balance of payments; structural reforms to improve the efficiency of resource use and support poverty alleviation, particularly in approaches to deregulation, liberalisation and privatisation; and the specific context of credit liberalisation and the provision of micro-credit. Barriers to gender mainstreaming include: insufficient analytic clarity regarding the ministry of finance's work and its changing role as a result of globalisation and economic liberalisation; lack of clear understanding of how gender is linked to that role; non-conducive institutional structures and ethos of ministries of finance; and insufficient capacity among women's organisations to engage effectively in macroeconomic policy debate.
Development planning	Planning processes that are partial and anti-cyclical have tended to contribute to increasing gender inequalities and the 'feminisation of poverty'. Development needs to be understood as human development, i.e., in terms not only of economic development but also of health and education, and needs to be measured using gender-sensitive indicators. Mainstreaming gender in the development planning process entails integrating a gender perspective in each of the main planning cycles of government – the macro/sectoral policy cycle, the annual budget cycle, the aid cycle and the project cycle – in order to produce a gender-sensitive medium-term development plan. The planning process should include the participation of the beneficiaries.
Public service	The three strategic points of entry for gender mainstreaming in the management of public service personnel are the Public Service Commission, the central personnel office and the line departments. Between them, these institutions are responsible for appointments and promotions, setting terms and conditions of employment, discipline, and staff training. Policy issues in this area include: eliminating gender-based discrimination as regards pay; ensuring an adequate gender balance in decision-making roles; determining equitable conditions of employment; ensuring disciplinary measures are devised and applied equitably; eliminating sexual harassment; providing gender-awareness training at all levels; ensuring equity in the availability of all training options; establishing partnerships with NGOs and the academic community; providing incentives for good performance and sanctions for practising gender discrimination; and adopting, where possible, a broad-based multi-pronged equal employment opportunities policy to address these issues.
Agriculture	Agriculture, a major sector of the economy in many developing countries, is heavily populated by women in subsistence farming, market vending and informal trading. Although both women and men are employed in this sector, the norm of unwaged work for women, men and children needs to be addressed in the context of gender roles and responsibilities, access to and control of resources and counting unwaged work in national accounts. Issues relating to global and regional free trade agreements, which include restructuring the agricultural sector and the impact of such restructuring on women and men, also need to be addressed by the GMS. In terms of gender equity, there is a particular need for advances to be made in three areas: land tenure, access to credit and technology, and the equal participation of women and men in policy-making and planning processes.

HANDOUT
3.3

Trade and industry	Traditional perceptions of the capacities of women can hamper their equal access to trade and management training, entrepreneurial development, credit and finance. Many women lack technical skills, experience and financial resources to enter into the business environment. Gender imbalances in the staffing of ministries of trade and related bodies need to be addressed; the ministry of trade should offer incentives to encourage private sector businesses and parastatal enterprises to take up gender as a priority issue and to increase recruitment of women into management level posts. Legal, administrative and policy issues include: the constitutional and legal aspects of commercial operations; property rights, licensing and company registration; access to credit and financing; and trade-related human resource development, including equal access to training.
Health	There is growing recognition of the need to acknowledge the different health experiences and health-care needs of women and men. Priorities should include objectives emanating from the International Conference on Population and Development (ICPD) in such areas as reproductive health and the empowerment of women. Sexually transmitted diseases (STDs) and HIV/AIDS require a special gender focus, as do primary health care services. Countries in which structural adjustment policies have eroded health services, causing additional burdens on women to provide health care at the household and community levels should factor this reality in the renewal processes of the health sector. Many ministries of health include environmental management and population policies in their portfolio. The relationship of these areas to gender should be reflected in sector plans and programmes.
Education	Educational institutions are agents of socialisation, therefore all factors relating to the socialisation process need to be analysed from a gender perspective. In most developing countries, more women than men comprise the human resources of this sector, especially at the level of classroom teachers. However, at the level of policy-making and senior management, typically there are more men. Integrating gender into education policies and plans should address such issues as literacy, enrolment, access to education, attainment, legal and administrative frameworks, the organisation of schools and classrooms, increasing the numbers of women managers, policy makers and decision makers, teacher training, curriculum development, textbook-stereotyping, and male underachievement in some areas.
Information/ communications	<p>The governmental information service should serve as the GMS's state-level media on gender affairs. Efforts to raise the gender-awareness of writers, reporters and editors need to focus on the following critical areas:</p> <p><i>Language:</i> authors and editors need to examine current conventions, use non-sexist language to avoid perpetuating questionable attitudes and assumptions about gender roles, and substitute more precise usages.</p> <p><i>Stereotyping:</i> Women in positions of influence are often tagged with stereotypical labels, or described in terms of their physical appearance, while male colleagues are described in terms of achievements. This de-legitimises the achievements of such women.</p> <p><i>Story selection:</i> Many stories about women are never told because they are not given importance, or because there is no effort to find out what women are doing or what their views are. Questions that need to be asked by media practitioners include: Who gets coverage? From what angle? Through which lens? Are stories helping to advance women's place in society or are they angled in ways that uphold traditional inequalities? Are women's concerns being separated from those of society in general?</p>



ACTIVITY 3.4

Mainstreaming gender in planning cycles

Aim To explore the co-ordination of planning cycles and processes for effective gender mainstreaming

Outcomes

- Define four planning cycles, the medium-term development plan (MTDP) and related terms and concepts
- Identify ways in which gender can be integrated into the main stages in preparing an MTDP
- Relate this planning exercise to earlier learning about the GMS

Time 1 1/2 hrs

Materials OHP, flipchart, pens, Handouts 3.4 a-d

Steps

- 1 Explain the aim of the session. Give out Handout 3.4a 'The planning process' and ask for volunteers to read the four paragraphs. Ask participants to keep the four key points from this handout in mind when they do the planning exercises. (5 mins)
- 2 Make a short presentation, using an OHP slide of Handout 3.4b 'Four planning cycles and the MTDP'. Review the meaning of gender-neutral policies, gender-specific policies, and gender-redistributive and -transformative policies. Provide an example of each. Give out Handout 3.4b. (10 mins)
- 3 Explain to the group that they will now look at the MTDP and ways to engender this process. To do this, they need to think about the planning cycle and promoting gender awareness at each stage. Put up an OHP slide of Handout 3.4c 'Planning cycle', and go through it with the group. Give out Handout 3.4c. (5 mins)
- 4 Give each participant Handout 3.4d 'Main stages in preparing a gender-aware MTDP', and ask them to read it. (5 mins)
- 5 Divide the group into two work groups. Ask them to go through each stage of the MTDP and identify the measures and actions they see as necessary. Examples of questions to think about:
 - Is it clear who has to do what?
 - In the light of the GMS, what are the mechanisms through which this engendering of each stage of the MTDP will take place?
 - How will the 'levers' be used in this process?Suggest that participants refer back to Activities 1.1 and 1.3 on the GMS to help them think through these issues. Ask each group to choose a rapporteur to feed back to the plenary on the strategies that will need to be in place to make all of these stages happen. (40 mins)
- 6 Groups feed back to the plenary, ten minutes each. (20 mins)
- 7 Note the main points on flipchart and wrap up the session.

Notes

- Use pp 28 and 29 of the *Development Planning* manual for background information on the four planning cycles
- Again there is a lot of material to get through in this session. You may want to break it into two.

HANDOUT
3.4a

The planning process

- 1 Planning tends to have a sectoral bias that results in a fragmented, compartmentalised approach and ignores cross-cutting gender needs and concerns. This problem is compounded in many countries where no single authority or agency takes the responsibility for implementing the country's overall development programme.

As a result, the failure to meet the needs of women in the different sectors is not evaluated.

- 2 Development planning should ensure that there is a link between sectoral budgetary processes and goals and national budgetary processes so that gender objectives can be integrated throughout the process.
- 3 Planning as a process should begin at the local level and involve representatives of both civil society and government.

Most importantly, it should lead to a planning process that promotes strategic gender goals from the bottom up through a co-ordinated system.

- 4 While most current planning methods seek to promote economic growth, gender planning prioritises the needs and conditions in which women live and work as a site for change. Gender planning involves a critical analysis of the gaps between women's and men's access to economic, social, political and cultural resources. It should not be seen as a separate, parallel process to mainstream development planning, but should transform mainstream development planning.

Key points

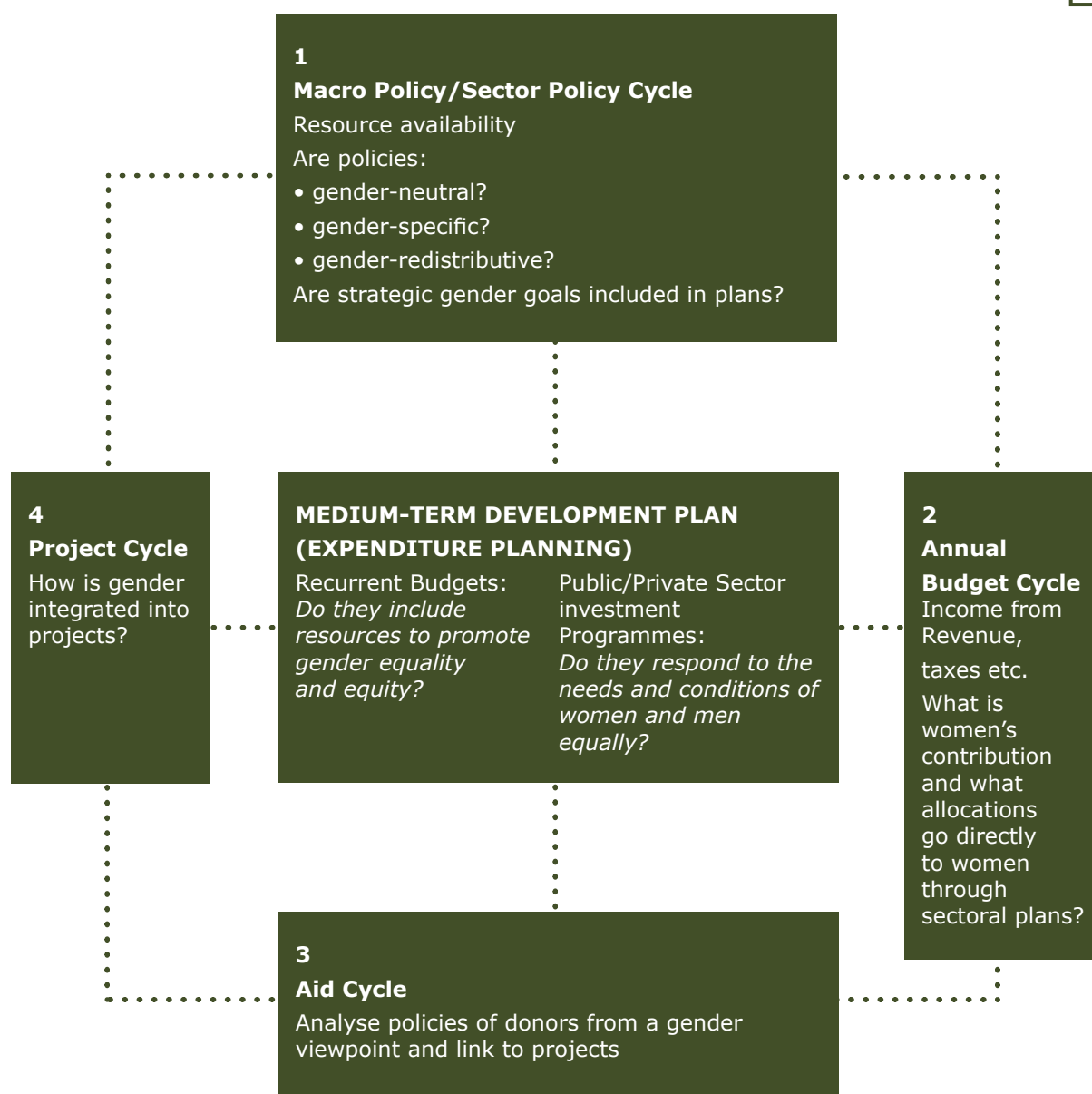
Gender mainstreaming is inhibited by:

- sectoral fragmentation and lack of overall co-ordination of development implementation and evaluation;
- delinked budgetary and sectoral planning;
- lack of participation in top-down planning processes; and
- the marginalisation of gender planning and its transformatory potential.



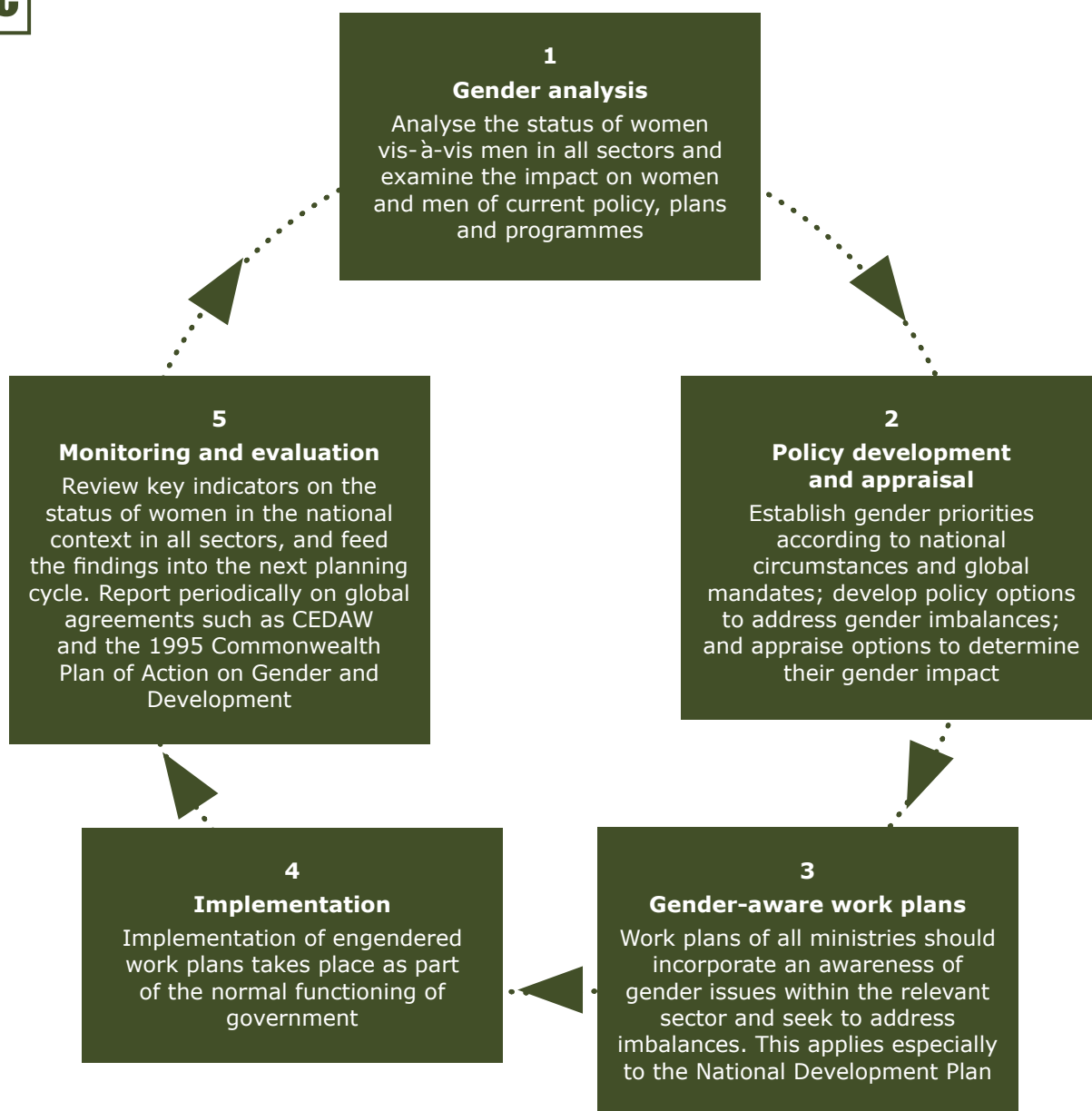
The four planning cycles and the MTDP

HANDOUT
3.4b



HANDOUT
3.4c

Planning cycle





Main stages in preparing a gender-aware medium-term development plan (MTDP)

HANDOUT
3.4d

- 1 **Approval by Cabinet of initial approach and timetable for development planning process.** The need for promoting gender equality through the MTDP should be explicitly stated.
- 2 **Preparation of initial macro framework:** Using available sex-disaggregated data to assess recent performance and current status of the economy and social development in the country, prospects for the medium and longer term, and their implications for government expenditure targets. This is viewed against social needs and pressure points that could cause political and economic turbulence. Gender status and analysis is critical in this framework, which should be developed in close consultation with NGOs, other civil society partners and the private sector.
- 3 **Macro issues paper to be considered by Cabinet:** A short paper to:
 - brief Cabinet (and senior officials) on the economic and social situation, and the comparative position of women and men;
 - present alternative scenarios for the country's economic performance over the MTDP, with corresponding scenarios for public expenditure to address gender inequality;
 - identify main macroeconomic and sector policy issues that the next MTDP needs to address.
 - mainstream strategic gender interests into these or prepare a paper on gender and the macro framework.

Cabinet reactions to the macro issues paper are reflected in drafting gender-sensitive guidelines for sector papers.
- 4 **Sector issues papers to be considered by Cabinet:** To be prepared by the sector concerned including women's/gender sector. Papers should be very short, alerting Cabinet to the main sector issues, impact on gender relations and gender inequalities, and the important trade-offs that must be considered.
- 5 **Detailed macro framework paper with expenditure guidelines:** In the light of reactions to the initial macro paper and to the sector issues papers, Cabinet is presented with a detailed macroeconomic and development paper. This proposes overall economic and public expenditure projections for the MTDP period and also proposes a sectoral allocation of resources. It serves as the framework for drafting of sectoral chapters and expenditure proposals for the MTDP. This paper should include a gender focus – addressing inequalities and promoting gendered planning in respect of resource allocations.
- 6 **Preparation of draft chapters, expenditure proposals and proposed projects:** Drafts to be prepared initially by the sector ministries. Development planning departments/agencies should assess objectives in terms of mainstreaming gender into all plans, policies and outcomes and refer back to sectors if gender analysis is missing.
- 7 **Review of draft chapters and preparation of consolidated expenditure programmes:** Co-ordination between central resource agencies (planning, finance, personnel) in reviewing sector proposals and preparing consolidated expenditure programme. Expenditure programme and review process to be co-ordinated with annual budget preparation. Ensure that tools are built in at this stage to monitor and evaluate the impact of the programmes in promoting gender equality and equity.
- 8 **Approval of full draft by Cabinet:** Overall editing by planning agency and submission of full draft to Cabinet for final approval. Prioritise gender, class, race/ethnicity as criteria to assess relevance of proposals. Cabinet to have a set of guidelines to measure proposals within criteria.
- 9 **Presentation to parliament:** MTDP submitted to parliament for full debate and approval. Parliament to understand the criteria (gender, race/ethnicity, income inequalities) and guidelines used to approve policy/plan.

ACTIVITY 3.5

Lessons from South Africa

Aim To relate achievements in South Africa that address gender equality in development planning to participants' own national contexts

Outcomes

- Analyse an account of development planning in South Africa
- Apply lessons to participants' own national context

Time 1 1/4 hour

Materials Handout 3.5 'Engendering development planning in post-apartheid South Africa', pens, paper

Steps

- 1 Explain the aim of the session.
- 2 Give out Handout 3.5 to all participants and ask them to read through it. (5 mins)
- 3 Divide the group in half and ask them to go through the questions at the end of the handout. (30 mins)
- 4 Back in the plenary, each group feeds back for ten minutes each. (20 mins)
- 5 Wrap up the session with discussion of two points:
 - How useful are the concepts learned in Module 3 for assessing the South African case?
 - How does South Africa compare with their own national development planning? (10 mins)

Notes

- For training in the non-state sector, you could use an NGO plan and report, or a study from a university or other institution. You would need to adapt the questions.



Engendering development planning in post-apartheid South Africa

HANDOUT

3.5

Aspects of women's situation in South Africa

- At least 35 per cent of households are headed by women.
- Woman-headed households are poorer than others, the income being approximately half.
- Over half of the unemployed are women.
- Women live in extreme poverty in rural areas and are burdened by multiple roles.
- Only 13 per cent of rural households have water and most do not have electricity. Women's time is taken up in fetching water and wood for fuel.
- The illiteracy rate for rural areas where women are in the majority is approximately 50 per cent, and 38 per cent in urban areas.
- Training and human resource development for women is limited to traditional female occupations.
- Women's rights and control over reproduction is still an issue, with 300,000 unsafe abortions taking place each year.
- All forms of violence against women and children are on the increase. South Africa has the highest per capita rate of reported rape in the world (115.6 for every 100,000 of the population in 1998). The actual rate is probably 20 to 30 times higher.
- Women are not recognised, not empowered and not seen as significant in the productive sectors of the economy.

The policy context

The interim constitution of South Africa specifically includes a clause on equality and the promotion of gender equality as a key objective of the State. The Government is beginning to fulfil this objective through the establishment of a Gender Commission, locating specific gender units/structures in government departments to ensure that all levels of the public sector integrate needs and interests of women in their programmes and projects. It has also ratified the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW).

In the post-Beijing period to date, most national government departments have committed themselves to a range of steps to enhance the status of women. Many of these initiatives were led by the Ministry of Social Welfare and the former Reconstruction and Development Programme (RDP) office.

In the province of Gauteng, the Gauteng Provincial Service Commission (GPSC) has led the initiative with the sub-commission of the provincial legislature and an intergovernmental forum. These initiatives have raised a critical awareness of gender needs and interests among government departments and civil society organisations.

Since 1994 women have been elected into the national Parliament, provincial legislatures and more recently local government structures. Their representation at national level is just over 30 per cent, with more women in Cabinet than ever before, but this representation is not matched by their qualitative participation in decision-making.

Translating policy into practice: the failure of the RDP

Unless development planning departments recognise the need to integrate gender into planning processes and unless planning is co-ordinated, these initiatives will be lost.

The RDP is a case in point. With carryover money amounting to 17 billion from donor aid and the 1996 budget, it was designed as a comprehensive programme to address poverty, reduce inequalities as a result of apartheid, restructure the economy, reform the civil service and build human resources (among other goals).

HANDOUT
3.5

However, the RDP process took place as a separate initiative led by democratic forces while the annual budgetary and planning process took place within the civil service. The logic of the process was neither understood nor immediately accommodated within sectors. The RDP office – subsequently disbanded – did not co-ordinate and synchronise all cycles. There was a time lag in allocating monies to the programmes identified and a build-up of unallocated money in government departments.

Poverty increased in spread and intensity, women’s positions worsened, and pressure on the Government to deliver led to the disbursement of funds to projects that were poorly conceived and implemented.

What should be done?

In order to advance gender equality in South Africa and integrate gender into government, the report on the status of women in Gauteng emphasises the following national and provincial priorities:

- The integration of a gendered analysis into all policies, programmes, structures and processes is central to the achievement of gender equality.
- A gendered analysis of the macroeconomic framework, the budgetary processes and allocations and the need to ensure that these documents are open to public scrutiny, and that competing interests and claims are mediated through a process that is inclusive of all concerned, is critical.
- A structure or unit should be established, tasked with the responsibility of developing gender plans with clear objectives and priorities to ensure the mainstreaming of gender into all government departments, especially that of development planning by:
 - reviewing existing policies and laws;
 - ensuring that all new policies are formulated within a gender analysis;
 - developing and implementing relevant legislation to advance the status of women;
 - developing a system of indicators and reports by all departments on the gender impact of their policies and budgets;
 - reforming economic planning systems to factor in women’s contributions and needs;
 - institutionalising a gender education and training strategy for government sectors to develop skills in gender planning, policy development and implementation;
 - participating in the government’s information systems to ensure the flow of gender information within government and between government and civil society;
 - encouraging the active involvement of the public, private and voluntary sectors in partnership with government to attain equality between men and women; and
 - promoting the establishment of data collection and analysis that will be gender-disaggregated and accurate.

Questions

- 1 How would you characterise the policy approach of the South African Government in relation to women (WID/GAD, welfare, anti-poverty, empowerment, etc.)?
- 2 To what extent have gender equality goals been integrated into policy and planning?
- 3 What impact has there been on women’s condition and position?
- 4 What lessons can be learned from the South African experience related in this case?
- 5 What can you learn from this for your own national context?