



Unit 6 looks at planning and action for gender mainstreaming. Once you have the information, as discussed in Unit 5, how do you use it to promote gender equality? How can you plan to promote gender equality, and to get your information included as a basis for policies and plans? This unit looks at the key area of gender planning, and how it relates to development planning and processes like gender action plans and gender-responsive budgeting.

The unit also discusses two mechanisms identified by the GMS as important in mainstreaming gender in organisations: management information systems and performance appraisal systems.

For this unit you will need the manual *Gender Mainstreaming in Development Planning*. This is on the CD-ROM included with the Toolkit, or you may have the published manual.

This unit will help you to:

- make links between gender planning and development planning
- describe the processes of gender planning, gender action plans and gender-responsive budgeting
- relate these processes to your own work
- identify uses of management information systems and performance appraisal systems
- identify other sources of information and further learning needs on GMS mechanisms

Development planning and gender planning

What is the relationship between development planning and gender planning? The *GMS Handbook* touches on this question in Chapter 2. *Gender Mainstreaming in Development Planning* considers it more fully.

Key points:

- "Gender planning should not be seen as a separate parallel process to mainstream development planning but should transform mainstream development planning to address the needs of women and poor people generally through an economically, socially and environmentally sustainable process." (*Gender Mainstreaming in Development Planning*, p 14)
- "Gender planning involves a critical analysis of the gaps between women's and men's access to economic, social, political and cultural resources. This analysis enables the development of policy initiatives to correct the imbalances – including cases where men are not benefiting equally from the development planning approaches currently in use." (Ibid)
- Traditional planning approaches have been called into question by major changes at the national and international levels resulting from globalisation. These changes include:
 - the shift to market-driven economics
 - the use of alternative planning approaches like incremental, partial and strategic planning
 - minimal regulation and intervention
 - structural adjustment and anti-cyclical growth
- Gender planning takes place within the wider context for action outlined in Unit 5, taking into account current frameworks such as the MDGs, PRSPs and SWAps.

Gender Mainstreaming in Development Planning looks at the question of mainstreaming gender into government ministries and agencies responsible for development planning. It is a core manual for use in combination with other GMS manuals.

Gender Mainstreaming in Development Planning: overview of contents

- 1 **Introduction**
Includes analysis of changes in approaches to development planning
- 2 **Approaches to development planning and gender analysis**
Expands on the conceptual background outlined in the *GMS Handbook*.
Presents a table classifying different types of government policy approaches to gender mainstreaming in development planning
- 3 **The state of development planning**
Looks at major issues and problems and suggests action points in relation to:
 - political will and adequate financial and other resources
 - development planning and macroeconomic policy
 - institutional concerns
 - public and private spheres
- 4 **Mainstreaming gender in planning cycles**
Identifies the stages of gender-aware policy and planning and the four major planning cycles
- 5 **Tools for gender mainstreaming in development planning**
Discusses the use of gender-sensitive indicators and budgetary tools for macroeconomic policy
- 6 **Two Commonwealth approaches to gender equality**
Description of two responses to engendering planning, using a 'typology' approach – i.e. classification according to type – for analysis and comparison

Spend a few minutes now scanning *Gender Mainstreaming in Development Planning* to see which parts of it will be useful to you. Note them for later study (e.g. analysis of state of development planning, or definitions and typologies). To help you, look back at the active reading tips outlined in Unit 4 (under 'What's in the manuals').

Defining the mechanisms and processes

This is the same kind of definitions exercise as in Unit 5.

Again, if part of your role involves introducing these mechanisms and processes to others, it is worth spending the time getting clear about your own understanding and definitions of them.

Write brief definitions of each of the items in the grid on the next page. What do you think are the key purposes and features of these planning processes and tools? As you work through the unit, you can add to your notes.



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Planning processes	Definition/description
Gender planning	
Gender action plans	
Gender policies	
Gender-responsive budgets and tools	

Gender planning

As mentioned above, gender planning involves a critical analysis of the gaps between women's and men's access to resources and developing policy initiatives to correct the imbalances.

In contrast to traditional planning, gender planning is socio-political and technical. It involves transformative processes and characterises planning as dialogue. It also critically examines the assumptions:

- that a planning methodology can simply adopt a universally applicable set of technical procedures
- that planners can determine people's demands and prioritise needs without investigating the situation on the ground (see *Gender Mainstreaming in Development Planning*, p 14)

Gender can be integrated into the four major planning cycles of government:

- the macro/sectoral policy cycle
- the budget cycle
- the aid cycle
- the project cycle (see p 28)

Gender planning occurs within the wider context for action, taking into account current frameworks like the MDGs, PRSPs and SWAp.

Example

Planning responses to gender equality in India and South Africa and a typology of development planning in practice.

The typology uses the following headings to assess the situation nationally and at state or province level:

- policy approach
- role of the state
- development approach
- macroeconomic framework
- institutionalisation of gender equality into planning framework
- distribution of funds/resources
- adequacy of planning data
- development practice regarding gender equality
- women's political and economic participation
- impact on reducing gender inequalities

This "highlights the links between policy, planning and national plans and the disjunction between macro policy and lack of changes in the position of women. It further highlights that development planning agencies have remained outside of the gender concerns and are in the main unaware of the need to mainstream gender equality into planning. Most countries' responses vary between a welfare and an anti-poverty approach in practice, although the rhetoric is of equity and transformation." *Gender Mainstreaming in Development Planning*, p 42

Gender action plans and gender policies

Alongside the process of mainstreaming gender in national development plans is the process of developing and implementing a gender action plan. This may be at the national, sector or organisational level.

To quote the *GMS Handbook*: "A central element of successful mainstreaming is the creation and implementation of a national Gender Action Plan. [This] should include an analysis of the status of gender equality/relations in all sectors of society, a proposal for setting up or strengthening the GMS structures and mechanisms, and plans for enhancing all ministries' capacity for gender-sensitive policy development and planning" (p 14).

Examples

Sector-specific

Science and Technology: Developing an action plan (p 72)

Identifies four phases in developing an action plan to mainstream gender:

- raising awareness
- process of legitimisation
- implementation and institutionalisation
- monitoring and evaluation

Organisational

Public Service: Elements for a gender action plan within the public service (pp 36-37)

Action to:

- realise established targets for numbers of women in decision-making positions in the public service

Cont'd on p 5



Cont'd from p 4

- eliminate gender-based discrimination in matters of appointments, promotions, pay, conditions of employment and disciplinary procedures
- provide gender-awareness training where needed, especially for heads of department in the core ministries, line departments heads, managers and decision makers throughout the public service
- set up institutional structures (e.g. a GMS) for the promotion, implementation and monitoring of gender mainstreaming in all core and line ministries and to supervise and monitor their functioning
- ensure that gender issues are integrated in the development of core and sectoral work plans and budget allocations
- establish or strengthen working partnerships between the public service and women's NGOs
- establish or improve monitoring and reporting systems to ensure that information on gender issues is timely and accurate
- provide incentives to, and/or impose sanctions on, government departments to encourage the full implementation of plans for gender equality

Gender-responsive budgets

Gender-responsive budgets are another important group of tools to mainstream gender in development planning and to achieve policy objectives. Again these tools are used within the wider policy framework of PRSPs and SWAps.

'Gender-responsive budgets' or 'women's budgets' are analyses of government budgets to establish the differential impact of revenue raising or expenditure on women and men and on different groups of women and men. There are a number of gender-responsive budgeting tools or approaches.

Sex-disaggregated beneficiary assessments This is a research technique whereby groups of women are asked how, if they were the finance minister, they would slice the national budgetary pie. The results are compared with the existing budget to see how closely it reflects women's priorities.

Sex-disaggregated public expenditure incidence analysis This involves analysing public expenditures (e.g. in health, education or agriculture) to see how such expenditures benefit women and men, girls and boys to differing degrees.

Gender-aware policy evaluation of public expenditure This involves evaluating the policy assumptions that underlie budgetary appropriations, to identify their likely impact on current patterns and degrees of gender differences.

Gender-aware budget statement This is a statement from each sectoral ministry or line department on the gender implications of the budget for both women and men within that sector.

Sex-disaggregated analysis of the impact of the budget on time use This looks at the relationship between the national budget and the way time is used in households, so as to reveal the macroeconomic implications of unpaid work such as caring for the family, the sick and community members, collecting fuel and water, cooking, cleaning, teaching children and so on.

Gender-aware medium-term economic policy frameworks These frameworks are currently formulated using a variety of economy-wide models that are gender-blind. Approaches for integrating gender awareness could include: (a) disaggregating variables by gender; (b) introducing new variables with a gender perspective; (c) constructing new models that include both national income accounts and household income accounts reflecting unpaid work; and (d) changing underlying assumptions about the social and institutional set-up for economic planning (see *Gender Mainstreaming in Development Planning*, p 37).

Example

Legal and Constitutional Affairs: South African Women's Budget Initiative (p 62)

A gender-responsive budget, pioneered by the South African Women's Budget Initiative in 1996, requires the examination of budgeted spending for programmes targeted at women (e.g. women's health-care programmes) as well as analysis of all general expenditures to determine their effects on women as a category.

Planning action

Information and planning lead to action. The following framework is designed to assist in planning discussions. "In all sectors and contexts, possible action to promote gender equality broadly falls into the listed categories. Agreed actions to promote gender equality should be included in policy and planning documents, and backed up with staffing, resources and indicators of change" (Derbyshire, 2002).

Type of action	Issues to consider
ORGANISATIONAL LEVEL	
Information systems and research	<ul style="list-style-type: none">• collating and commissioning targeted gender analytical research• establishing sex-disaggregated information systems
Building the capacity of staff in policy-making, management and implementation agencies	<ul style="list-style-type: none">• developing staff gender-related skills, knowledge and commitment, e.g. through training workshops, consultancy support, provision of guidelines
Promoting gender equality in policy-making, management and implementation agencies	<ul style="list-style-type: none">• development of procedures to promote equality in recruitment and career development• identifying and addressing gender-related issues in the organisational culture
Solidarity and networking	<ul style="list-style-type: none">• activities to link together individuals and groups working for gender equality
BENEFICIARY LEVEL	
Addressing women's and men's practical needs	<ul style="list-style-type: none">• recognising and addressing practical needs/problems identified by and particular to either women or men, e.g. developing domestic labour-saving devices for women
Promoting equality of access and benefit	<ul style="list-style-type: none">• promoting greater gender equality in relation to resources, services, opportunities and benefits, e.g. increasing women's access to previously male-dominated employment opportunities
Increasing equality in decision-making	<ul style="list-style-type: none">• promoting women's and men's equal participation in community level decision-making institutions and in community representation
Addressing the ideology of gender inequality	<ul style="list-style-type: none">• working with beneficiary groups to reflect on gender norms, traditions and values, e.g. participatory community workshops on HIV/AIDS• addressing inappropriate gender stereotypes, e.g. reviewing school textbooks for inappropriate gender stereotyping



The logical framework

The logical framework (logframe) is the standard mechanism for mainstreaming gender within policies and plans. It is used to summarise objectives, activities, indicators and resource commitments (e.g. for PRSPs and SWApS). It is the focus for planning, management, resource allocation, accountability and review. Gender issues relevant to the policy, plan or project are included in the logframe. As a reminder, the structure is reproduced here.

Project structure	Objectively verifiable indicator	Means of verification	Important assumptions/risks
Goal			
Purpose			
Outputs			
Activities	inputs		

For a presentation outlining the purpose and benefits of a logframe and practical steps towards developing one, see www.livelihoods.org/info/tools/IMMLogframe.html

Putting ideas into practice

As in Unit 5, the next activity asks you to apply what you have learned in this unit to your own context. Use your own task or scenario that you developed in Unit 5. There you identified the information needs. Think now about what steps you would take to promote gender equality in policies, plans and projects. How could you use the logframe to achieve the purposes?

Relate what you have learned to your own context, with names, places and times to give you an example of what's involved in practice.

Your scenario

Steps to take

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Organisational mechanisms

Finally this unit looks at two mechanisms identified by the GMS as important in mainstreaming gender in organisations. These link to the change management approaches in Unit 7.

Management information system

This is the mechanism for gathering gender analysis data and for sharing and communicating findings. It is both the central repository and the means to generate and disseminate gender information. It develops the use of sex-disaggregated data based on gender-sensitive indicators to provide material for gender impact analysis, policy appraisal and monitoring and evaluation. Its role is also to communicate findings. (See *GMS Handbook*, pp 15 and 39.)

The GMS describes the management information system as one of the “communication levers for change” in gender mainstreaming, a mechanism to provide the flow of information on which to base diagnosis and action.

Performance appraisal system

This mechanism is described by the *GMS Handbook* as the “incentive/boundary lever” for change.

A gender-sensitive performance appraisal system can measure changes in individual and department standards towards achievement of the goals of the GMS. In particular, it should measure the extent to which individual staff members have (a) acquired gender awareness (e.g. through training) and (b) applied such awareness in their work (e.g. through the achievement of gender goals or the institution of gender-specific programmes). This information should form part of the criteria for career advancement. Incentives do not have to be financial – see box.

Example

Public Service: incentives and sanctions (p 35)

These rewards do not necessarily have to be financial; in fact research suggests that recognition and feedback may be more effective than money as motivators.

Non-financial rewards can include certificates, awards of merit and medals or pins. For such awards to maintain credibility, they should indicate that recognition of good performance has come from the highest levels, namely the President’s or Prime Minister’s office or the minister of the relevant department.

Where there is discrimination, a first step would be to determine the cause. Is the manager experienced in and aware of gender issues? If not, could the situation be improved through gender awareness training? Ultimately such discrimination could result in sanctions such as transference to another post, reduction in grade level or disciplinary action.

Based on the result of organisational gender analysis and gender audits, the GMS should set targets for gender equality in specific areas that should be evaluated at both individual and departmental level.



Further activity

At the end of these two units on the key GMS processes – information and planning – think about your further reading and research on these topics.

Look for other sources of information, for example, background reading, websites, local resources or networking contacts. Follow up the references to examples in the sector manuals, and look at the Training Manual for training resources about the mechanisms.

List here the action you plan to take.

Which processes do you need to study in more depth?

Why? What do you hope to achieve by doing this?

How long will it take you?

When will you do it?

Who will help you?

What other sources of information do you have?

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Checklist

- Make links between gender planning and development planning.
- Describe processes of gender planning, gender action plans and gender-responsive budgeting.
- Relate them to your own work.
- Identify uses of management information systems and performance appraisal systems in gender mainstreaming.
- Identify other sources of information and further learning needs on GMS mechanisms.





Use this page to make notes.