



By now you will have built up an overview of what is in the *GMS Handbook* and the sector manuals. You should also have a broad understanding of gender mainstreaming and – more specifically – the GMS. The next question is how to apply this knowledge to your task, i.e. to implement GMS principles at policy, programme and project levels. The key mechanisms to achieve this relate to information and planning. These are common to all sectors, underpinning the GMS structures and processes. Unit 5 looks at information and Unit 6 at planning.

For this unit you will need the manual *Using Gender-Sensitive Indicators*. This is on the CD-ROM included with the Toolkit, or you may have the published manual.

This unit will help you to:

- identify key GMS mechanisms common to all sectors
- explain why information is important in gender mainstreaming
- describe what kind of information is needed, including the use of gender-sensitive indicators
- describe how information can be collected using gender-sensitive processes
- give examples of when information mechanisms might be used by relating them to your own work

The wider context

The gender management system, as outlined in Unit 3 of this Action Guide, is an approach to gender mainstreaming developed by the Commonwealth Secretariat particularly for use by governments and other stakeholders. Other approaches (see box 'Four steps to gender mainstreaming') may focus on different methods and strategies for different purposes or target organisations.

Four key steps of gender mainstreaming

Step 1: Sex-disaggregated data and gender analytical information

Gender analytical research and sex-disaggregated statistical data – about both 'beneficiary' groups *and* implementing organisations - are essential to effective gender mainstreaming. Information systems should routinely be disaggregated by sex and gender analysis (an examination of women's as well as men's experiences, needs and priorities) should routinely be part of social and institutional appraisal and monitoring processes. Gender analytical studies should be commissioned to examine particular issues and address information gaps. This information is necessary to: (a) identify gender difference and inequality; (b) make the case for taking gender equality seriously; (c) design policies and plans that meet women's and men's needs; and (d) monitor the differential impacts of policy, project and budget commitments on women and men.

Step 2: Women as well as men influencing the development agenda

Women will only win equality when they are able to act on their own behalf, with a strong voice to ensure their views are heard and taken into account. This means promoting the involvement of women as well as men in decision-making at all levels. It also means ensuring that men and women committed to the promotion of gender equality are influencing decision-making. 'Gender advocates' within government, civil society and donor organisations are most effective when they work in collaboration, identifying and developing strategic 'entry points' for the promotion of gender equality.

Step 3: Context-specific action to promote gender equality

Action to promote greater equality of influence, opportunity and benefit for women and men should be devised on the basis of context-specific sex-disaggregated data and gender analytical information. It should also be based

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on a clear understanding of women's and men's priorities. Action needs to be: (a) explicitly included in policy and project documents and frameworks; (b) backed up with staff and budgets; and (c) monitored and reviewed through appropriate indicators of change.

Step 4: Organisational capacity building and change

Gender mainstreaming depends on the skills, knowledge and commitment of the staff involved in management and implementation. 'Evaporation' of policy commitments to gender equality is widespread. Developing appropriate understanding, commitment and capacity – as well as addressing issues of gender inequality within development organisations themselves – is a long-term process of organisational change. Like action promoting gender equality, appropriate capacity-building needs to be: (a) explicitly included in policy and project documents and frameworks; (b) backed up with staff and budgets; and (c) monitored and reviewed through appropriate indicators of change.

Adapted from Derbyshire, 2002.

In addition, the context for action is always changing. For example, since the GMS was first developed in 1999, the Millennium Development Goals (MDGs) have been agreed to, providing a framework for action, and Policy Reduction Strategy Papers (PRSPs) and Sector Wide Approaches (SWAs) have been introduced (see boxes). These processes now dominate the development scene, affecting gender mainstreaming work. Implementing a GMS needs always to take account of and operate within the current policy context.

Millennium Development Goals (MDGs)

The MDGs were agreed at the United Nations Millennium Summit in 2000 and subscribed to by both developed and developing countries. The goals are to:

- 1 eradicate extreme poverty and hunger
- 2 achieve universal primary education
- 3 promote gender equality and empower women
- 4 reduce child mortality
- 5 improve maternal health
- 6 combat HIV/AIDS, malaria and other diseases
- 7 ensure environmental sustainability
- 8 develop a global partnership for development

One or more time-bound targets have been set for each goal, mostly for 2015, using 1990 as a benchmark. Indicators have been identified to measure progress against each target.



Poverty Reduction Strategy Papers (PRSPs)

PRSPs describe a country's macroeconomic, structural and social policy and programmes to promote growth and reduce poverty, as well as associated external financing needs. They are prepared by governments through a participatory process involving civil society and development partners, including the World Bank and the International Monetary Fund (IMF).

The strategies should be:

- country-driven – involving broad-based participation by civil society and the private sector in all operational steps
- results-oriented – focusing on outcomes that would benefit the poor
- comprehensive in recognising the multidimensional nature of poverty
- partnership-oriented – involving co-ordinated participation of development partners (bilateral, multilateral and non-governmental)
- based on a long-term perspective for poverty reduction

A country only needs to write a PRSP every three years. However, changes can be made to the content of a PRSP using an Annual Progress Report.

(See www.worldbank.org/poverty/strategies/)

Sector Wide Approaches (SWAs)

The sector wide approach involves donor support to the development of an entire sector in a given country. This is in contrast to a project-based approach in which individual donors each support a particular set of activities within the sector (e.g. building schools or roads).

SWAs are ideally developed by the government in consultation with all stakeholders and investors, including donor agencies. Under the leadership of the government, these parties work together to define:

- an overall sector policy framework
- priorities, objectives and performance measures
- expenditure programmes
- institutional reform and capacity building needed for implementation
- management, reporting and accounting arrangements

Major donors would then jointly support the sector programme, preferably using common procedures. Another characteristic is that technical assistance is commissioned directly by governments rather than donor agencies.

(Adapted from www.oecd.org/dataoecd/24/17/1956174.pdf.)

What are the mechanisms?

From your work so far on this Action Guide, your reading of the *GMS Handbook* and sector manuals and from your own experiences, note down what you think are the most important mechanisms (or processes, skills and tools) needed to establish a GMS. Try to do this without looking at the feedback below.

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You have probably noted some or all of the following – as well as others not on the list:

Information (covered in this unit)

- gender analysis
- gender impact assessment
- gender audit
- using indicators
- gender-sensitive consultation

Planning (see Unit 6)

- planning processes
- budgetary tools
- gender action plans
- gender policies

Organisational systems (see Unit 6)

- management information system
- performance appraisal

Change and capacity

- change management (see Unit 7)
- capacity building – individual and organisational (see Unit 7)
- training (see Unit 8)
- skills such as advocacy and lobbying (see Unit 9)

You may also have noted that the four principal mechanisms specified in the *GMS Handbook* are: gender analysis, training, management information system and performance appraisal.

Think about the information mechanisms and, if possible, make brief notes in the grid on the next page to define or describe them. The rest of this unit looks at these in more detail, so you can add to your notes as you work through it.



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Information mechanisms	Definition/description
Gender analysis	
Gender impact assessment	
Gender audit	
Using indicators	
Gender-sensitive consultation	

Information: why?

Why is information so important? Information on women's and men's experiences is essential for gender mainstreaming so as to identify problems and gaps, plan action and monitor change. Information enables you to understand the policy context, set policy direction and plan action at project and policy level linked to defined objectives. You need to know what the situation is, you need ways of planning what to do – and your information should lead to action.

Information relates to the objectives to be achieved:

- At policy level, it is the foundation of work on MDGs, PRSPs, SWApS and broader development planning.
- At project level, it provides the basis for planning and action, again relating to the project objectives.
- In work to establish GMS structures and mechanisms, it gives a picture of the current situation and needs.
- It gives you a framework to evaluate any situation at the start, and to monitor and evaluate during and at the end of the action/development project.

"In efforts to advance equality and equity between women and men, there is a need to generate accurate and relevant data on the status of women, men and gender relations. This data helps make gender biases more visible and facilitates effective policy-making to bring about greater gender equality and equity." *Using Gender-Sensitive Indicators*, p 7

Gender analysis

Gender analysis is the key process that underpins tasks at all stages. The *GMS Handbook* describes gender analysis as a "communication lever for change" in gender mainstreaming, providing the flow of information and understanding on which to base diagnosis, action and evaluation. It offers the following definition (p 15):

"Gender analysis: this involves the collection and analysis of sex-disaggregated data which reveals the differential impact of development activities on women and men, and the effect gender roles and responsibilities have on development efforts. It also involves qualitative analyses that help to clarify how and why these differential roles, responsibilities and impacts have come about."

(Qualitative data typically involves words whereas quantitative data involves numbers. For example, quantitative data would look at how many people were treated at a health centre, while qualitative data would ask questions about the quality of care.)

Example

Science and Technology (p 70) suggests how gathering information and a gender analysis can ensure that policy has a gender perspective. The steps are:

- identify problems, issues and objectives of the policy initiative
- define desired/anticipated outcomes and indicators
- conduct inclusive research
- learn from the process
- set targets
- develop options for recommendations and prioritise them
- communicate the recommendations

Gender impact assessment

This is a tool to evaluate the impact on gender relations of any policy proposal or decision at national or local levels. Policies that seem to be gender neutral may in fact affect women and men differently. The aim of the assessment is therefore to avoid unintended negative effects and make policies more effective. It is made on the basis of set criteria before policy is implemented. Some suggested criteria to measure the impact on gender relate to differences between men and women in terms of participation, resources, norms and values and rights. The assessment can be qualitative, quantitative or both.

Examples

Agriculture and Rural Development (p 37) gives an example of a gender-analytical framework that can be used as a guide to carrying out a gender impact analysis of government policies in this sector. The information generated by such an analysis can be used to formulate or revise policies and plans, plan interventions and evaluate programmes and projects. It can be used as a one-time assessment instrument or to provide baseline information prior to developing a plan. In the latter case, use of the tool after the plan has been implemented will allow for a pre/post information comparison and an evaluation of its impact.

Areas of scrutiny include:

Gender policy environment:

policy statement
policy implementation and review
resources
problems and barriers

Gender and agricultural policy:

policy on agriculture
involvement of men and women
steps to review policies, projects and programmes
collaborative programmes
access to information and resources
availability of data
level of awareness
staff development

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Cont'd from p 6

Agricultural extension policy:

availability
access
eligibility
participation
human resources
financial resources
decision-making
achievement/impact

Education (p 28) offers guidelines for conducting a gender impact analysis, including discussion of major gender planning/analytical frameworks.

Gender audit

Sometimes the term 'gender audit' is used as an alternative term for gender analysis to describe gender analysis of an organisation. However, it can be used more specifically to describe a process for organisational self-assessment, action planning and monitoring.

Examples

Finance (p 32) identifies a gender audit as an action point to incorporate a gender perspective into the plans, policies and programmes of the finance ministry:

"The gender audit examines how [certain specific] dimensions of gender are affected by specific policies and programmes. It then identifies positive steps to be taken to engender these plans and programmes. The audit would need to examine ways in which both the routine work of the finance ministry and its plans for the future can be made more gender sensitive. Current programmes and plans may have to be retro-fitted to at least partly incorporate more gender-sensitive approaches."

Agriculture and Rural Development describes an audit of gender awareness in the ministry of agriculture and related departments and organisations, to reveal areas of strength and weakness and to assist in defining a strategic entry point for gender mainstreaming in the sector. Questions asked cover:

- representation in decision-making
- constraints and problems
- gender awareness
- personnel and staff development
- institutional autonomy
- equal employment opportunities

Why?

In relation to your own task or situation, note here why you need information (e.g. to meet particular objectives or for a specific project).

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Information: what?

What kind of information is needed? What do we need to know to ensure that policy/planning/implementation/monitoring addresses the needs of women and men (and girls and boys) and benefits everyone? Information is needed to make gender biases more visible and to facilitate effective policy-making and action. It therefore needs to link closely to objectives at policy, project and organisational levels.

Sex-disaggregated data

This is data collected via questionnaires, observation or other techniques linked to censuses and household and other surveys that reveal the different roles and responsibilities of men and women. Having data disaggregated by sex is important to assess the impact of a project on women separately from its impact on men.

Gender-sensitive indicators

Indicators are statistical measurements that show the change in a particular context over a given period of time. A gender-sensitive indicator is therefore a measurement of gender-related change over time. For example, it could show the change in the status of women in a particular area, relative to men and over a period of, say, a decade. Gender-sensitive indicators can therefore be used to measure the effectiveness or success of a GMS (*GMS Handbook Glossary*, pp 62-63).

Gender analytical framework

This defines categories of inquiry and issues to consider as a guide to the process of gender analysis. Existing frameworks may be helpful, but may not apply to a particular sector or situation (see Training Manual Introduction 4.5 'Frameworks for gender analysis and planning' for descriptions of the Harvard, Moser, Women's Empowerment and IDS Social Relations frameworks). You will probably need to draft your own framework to define what it is you need to know.

Using *Gender-Sensitive Indicators* covers the topic in detail and is essential reading for gender analysis tasks. It explains the topic, sets out limitations and pitfalls and offers practical advice.

Using Gender-Sensitive Indicators manual: overview of contents

- 1 **Introduction and overview**
What gender-sensitive indicators are and why they are useful
Gathering and classifying indicators
Interpreting indicators, and their limitations
- 2 **Developing a national-level database**
Information about data sources, a critique of processes and methods, training and popular participation
Checklist of methodological points when using gender-sensitive indicators at the national level
- 3 **Gathering and using gender-sensitive indicators**
Looks at the following ten groups/areas with specific guidelines and questions for each:
 - population
 - settlements
 - households
 - education
 - health
 - economic activity
 - access to land
 - legal rights
 - violence against women
 - macroeconomic policy

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4 The state of the art

Summarises recent developments at the UN and among donors

5 Good practice case studies

From Canada, Ghana, India and the Philippines, with lessons learned about methods, focus, coordination, political commitment, targeting and public participation

Appendix

Lists indicators in priority areas of the ten groups listed above

Spend a few minutes now scanning *Using Gender-Sensitive Indicators* to see which parts of it will be useful to you. Note them for later study.

Example: In the area of violence against women, *Using Gender-Sensitive Indicators* notes several indicators of gender-related violence (p 31). These could be used for the development of gender-sensitive indicators at the national level, and would need to be generated through the use of specially commissioned surveys.

Gender-sensitive indicator	Related indicator questions
1 Number of reported cases of domestic violence	<ul style="list-style-type: none"> • Has the country followed CEDAW recommendations and reported on laws enacted to protect women from violence? • How effective is legislation banning different forms of violence against women? • Are the representations of women in the media, in advertising or in school curricula likely to lead to violence against women? • In what ways have women organised to combat violence? What has been the result of this organisation? • Does the country enforce the UN Convention prohibiting the slave trade and exploitation through prostitution? What measures does the country have to address the commercial sexual exploitation of girls? • Are women refugees protected during periods of armed conflict?
2 Number of reported cases of sexual assault against women	
3 Number of reported cases of sexual harassment	
4 Conviction rates of accused violent offenders against women	
5 Number of immediate protective measures taken to assist abused women (legal aid, financial assistance, housing assistance, shelters, police action, NGO efforts)	
6 Increase/decrease of violence against women during armed conflict	

What?

In relation to your own task or situation, note here what kind of information you need. What will be the main issues to examine? What in your view are the main information gaps?

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Information: how?

After defining why you need information and what it is you need to know, the next stage is to decide how to collect it. Meeting information needs involves the systematic collection and analysis of information, using a range of tools common across all sectors and activities.

Using Gender-Sensitive Indicators identifies the main sources for national-level data to support national-level planning (p 10) as:

- census surveys
- System of National Accounts
- sample surveys

It also discusses ways of making these systems more gender sensitive.

Gender-sensitive consultation and stakeholder analysis

Processes of information collection through consultation and stakeholder analysis need to be gender sensitive to ensure that women's as well as men's needs are taken into account. These processes should involve:

- participatory consultation with women as well as men
- women as well as men in decision-making at all levels
- advocates to ensure women's as well as men's active involvement in consultation and decision-making

This means ensuring that:

- women's groups are actively involved in consultation and decision-making processes
- the range of women's views and needs is represented (e.g. on the basis of class, age and ethnicity)
- the processes of stakeholder analysis include
 - women and men as separate stakeholder groups
 - where appropriate, different stakeholder groups amongst women (and men)
 - clarity regarding stakeholder groups that include both women and men
- consultancy teams etc include women as well as men

Example

Science and Technology (p 71) points to the need to carry out inclusive research that ensures all voices are heard:

"Consultation strategies which are inclusive, dynamic and open are essential. The selection of representatives of social groups should reflect the true diversity of people affected by the policy, avoiding stereotyping or aggregating of groups, so that all voices have an equal chance of being heard. This will likely require scheduling consultations during times and in places which are more convenient for certain groups. Where topics may be sensitive or taboo for women to discuss with men, female researchers should be utilised."



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How?

In relation to your own task or situation, note here how you could best collect the information required. What would be appropriate methods and how could you ensure that they use gender-sensitive approaches?

Putting ideas into practice

The last stage of this unit asks you to apply what you have learned about the why, what and how of gender information to your own context.

Choose a task or scenario from your own work. This may be the task you identified in Unit 2, or one step towards your overall task. Relate what you have learned about gender information to this work context, with names, places and times, to give you a real 'worked example' of applying a mechanism or process.

Questions to think about:

- Why do you need to collect information? What objectives will it help you achieve?
- What gender analytical information do you need?
- What sex-disaggregated data do you need – for example, about beneficiary groups or the organisation?
- What sources of information can you draw on?
- What information do you already have (e.g. existing surveys)?
- What steps do you need to take to collect the information? What processes could you use? Who else can you involve?

Sample scenarios

Education

You are the gender focal point in the Ministry of Education. The Ministry is developing a universal primary education policy in accordance with Millennium Development Goal 2. You have been asked to assist the team in ensuring adequate attention to gender issues.

What information do you need and what steps will you take?

Agriculture and rural development

You have recently been appointed gender focal point in the Ministry of Agriculture and Rural Development. You have been asked to provide advice on gender issues to a newly-established team working on rural access. The team is conducting a feasibility study for a project promoting poverty-focused rural transport interventions. This will include:

- rehabilitation of roads, tracks and bridges used locally for access to markets, services and basic needs

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- development and promotion of forms of transport appropriate to the needs of rural people, including, for example, bicycles and carts

Local people will be required to provide labour and to contribute to the cost of improvements.

What information do you need in order to design this project in a gender-sensitive manner? Are any of the commonly used gender planning frameworks suitable for your needs – either individually or in combination?

(Scenarios suggested by Helen Derbyshire)

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Your scenario:

Information needs

Why?

What?

How?



Checklist

- Identify key GMS mechanisms common to all sectors.
- Explain why information is important in gender mainstreaming.
- Describe what kind of information is needed, including the use of gender-sensitive indicators.
- Describe how information may be collected, using gender-sensitive processes.
- Apply what you learn about information needs, by relating it to your own work.