A MANUAL FOR GENDER AUDIT FACILITATORS

THE ILO PARTICIPATORY GENDER AUDIT METHODOLOGY

2nd Edition

International
Labour
Office

A GENDER
EQUALITY
T O O L

The International Labour Organization

The International Labour Organization was founded in 1919 to promote social justice and, thereby, to contribute to universal and lasting peace. Its tripartite structure is unique among agencies affiliated to the United Nations; the ILO's Governing Body includes representatives of governments, and of employers' and workers' organizations. These three constituencies are active participants in regional and other meetings sponsored by the ILO, as well as in the International Labour Conference – a world forum that meets annually to discuss social and labour questions.

Over the years the ILO has issued for adoption by member States a widely respected code of international labour Conventions and Recommendations on freedom of association, employment, social policy, conditions of work, social security, industrial relations and labour administration, and child labour, among others.

The ILO provides expert advice and technical assistance to member States through a network of offices and multidisciplinary teams. This assistance takes the form of labour rights and industrial relations counselling, employment promotion, training in small business development, project management, advice on social security, workplace safety and working conditions, the compiling and dissemination of labour statistics, and workers' education.

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ILO commitment to gender equality in the world of work

Since its founding in 1919, the ILO has been committed to promoting the fundamental rights of women and men at work. The ILO promotes gender equality, not only as a basic human right, but also as intrinsic to the goals of decent work and poverty alleviation and as an instrument for a more inclusive globalization.

Gender equality is fundamental to the ILO's four strategic objectives to achieve decent work for all women and men. These are to:

• promote and realize standards and fundamental principles and rights at work;
• create greater opportunities for men and women to secure decent employment and income;
• enhance the coverage and effectiveness of social protection for all; and
• strengthen social dialogue and tripartism among the ILO's three constituents – governments, and employers' and workers' organizations.

The ILO seeks to fulfil the various United Nations commitments concerning gender equality, including the UN Charter itself, the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), the Beijing Platform for Action and the Millennium Development Goals (MDGs).

The ILO Bureau for Gender Equality supports the implementation of the Organization's Policy on Gender Equality and Mainstreaming through capacity building, knowledge sharing and policy advice to constituents and ILO staff on measures to ensure that policies, legislation and institutions are more gender-equitable. The Bureau plays a leading role in conducting gender audits both within the ILO as well as among its constituents and other national international organizations.

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FOREWORD

Despite much effort and significant progress in many domains, gender equality is still lagging behind in a rapidly changing world. Transformations in the roles of women and men, their relations with each other, and the nature of the households, markets and societies in which they live continue to evolve in a globalized environment.

Gender equality cannot be achieved when discrimination remains embedded in political, economic and social institutions and in development processes; it often remains unaddressed or is addressed in an uneven manner. Shifting boundaries and values create tensions that are sometimes magnified by rapid globalization. Men and women may experience the day-to-day manifestations of these strains in their inter-actions, in their search for jobs and participation in the labour market, or in accessing credit, technology and assets as they continue to perform their socially ascribed roles. While some may benefit from new opportunities, many may continue with traditional gender roles and suffer from increased burdens and stress.

For the ILO, the pursuit of gender equality is justified on two grounds:

First, there is the *rights-based equity* rationale. It argues the need to address the discrimination women face as a matter of fundamental human rights and justice. Despite the goal of eliminating discrimination based on sex, women continue to face disadvantages compared with men, who enjoy greater opportunities and better treatment in most areas of economic and social life. Marginalized populations, especially indigenous and tribal women, are exposed to multiple forms of discrimination and consistently fare poorly in terms of socio-economic opportunities and treatment. These types of inequality deprive women of choice in employment and are contrary to normative considerations of fairness and justice.

Second, there is the *economic efficiency* rationale, which argues that women can play a critical role as economic agents capable of transforming societies and economies. Equality is not just an intrinsic value and a right in itself, but is instrumental in achieving economic growth, social change and poverty reduction. Relevant in all cultural settings, economic empowerment of women unleashes their energy, skills and potential as a force for development. Women's increased bargaining power and decision-making ability in the household, as well as their improved status and income, have led to a number of positive secondary effects, such as enhanced child nutrition, health and education for girls and boys, better child-care practices, lower infant mortality rates and less child labour.

Progress on gender equality is gauged by many criteria, but how can organizations be assessed for mainstreaming gender issues and for creating gender equitable work environments? One way is by conducting an ILO Participatory Gender Audit (PGA). Now a mature methodology after more than ten years of implementation, the usefulness of the PGA has generated great international interest among constituents, donors agencies, training organizations and academic institutions.

This Manual provides PGA facilitators with guidelines and practical instructions on how to undertake a PGA in an organizational context. Its content and structure are based on training materials that are being used to prepare facilitators to conduct PGAs. Originally conceived to be used for training internal ILO facilitators, it has been further revised to reach a wider target group in response to numerous requests from other organizations and structures such as the ILO constituents – governments, workers' and employers' organizations – as well as many UN agencies and national and international training institutions that wish to undertake PGAs within their own organizational context.

A step-by-step approach is used that leads facilitators through each stage of the process culminating with guidance on writing a PGA report that covers key findings, good practices and a set of recommendations to the audited unit or organization. The PGA report provides the basis

for the formulation of an action plan on how to improve the gender mainstreaming strategy in a given institutional setting. The first of its kind in the UN system, the ILO PGA is a tool that supports an organization's commitment to gender equality by examining the extent to which equality is being institutionalized; helps to identify good practices in technical work; and points to effective and efficient ways of moving forward in mainstreaming gender in all work activities. Since its launch, the PGA has demonstrated that it is a relevant, dynamic and extensive means of assessing the ILO's progress in promoting gender equality in the world of work.

This revised Manual is based on the ILO's practical experience of piloting PGAs of many ILO technical units and country offices, constituents and UN partners from 2001 to 2012. It is hoped that this Manual will be a valuable resource as a training guide for different institutions for gender mainstreaming. Since it is a process-oriented organizational tool specifically aimed at gender audit facilitators, it has great potential for further adaptation and use by the ILO's constituents, UN agencies, women's groups and other civil society organizations. To this effect, more and more Training of PGA Facilitators have been conducted by the ILO Bureau for Gender Equality as well as the ILO International Training Centre, Turin to enhance the capacity of other organizations to carry out PGAs so as to strengthen their institutional mechanisms for gender equality promotion. This will result in a multiplier effect and the creation of a "pool" of trainers who will be available to build capacity at international, regional and national levels for their own stakeholders.

Many of the revisions suggested here have already been experimented in various training sessions informally, as *ad hoc* extensions of the contents in the original Manual. They have been found to work effectively. None of the revisions are intended to be a major change from the earlier conceptual framework. Rather, the issue is one of further strengthening the methodology and process, providing more detailed and practical advice on how to carry out the process during a PGA, modifying some sections, and taking into consideration problems and challenges that have emerged during the audit process in specific organizational contexts. We hope that the revised Manual will continue to build the capacity of all those who believe that self-assessment through a participatory approach is critical in strengthening the process of organizational learning, particularly when the advancement of gender equality is the goal.

ACKNOWLEDGEMENTS

Training processes are organic and evolve constantly, and, as such, support materials need to be updated to take this into account. The ILO Bureau for Gender Equality wishes to thank all those women and men who have supported and contributed to the development of the different stages of this revised Manual for Gender Audit Facilitators. Much of the original Manual remains, and therefore acknowledgement to its contributors are reiterated.[2]

A number of colleagues who contributed to the original Manual have also helped with this revised version. A special word of appreciation goes to Susan Maybud who has been responsible for the overall preparation and revision with inputs from Adrienne Cruz, Nelien Haspels and Ned Lawton. Simonetta Cavazza, Benedetta Magri and Johanne Lortie of the International Training Centre of the ILO in Turin gave generously of their time and expertise and shared their practical experiences. Former ILO colleague Jyoti Tuladhar also provided input for the revision based on her years of experience as coordinator of the PGA. Acknowledgements are also due to numerous other colleagues who have collaborated in conducting gender audits of the ILO constituents and UN agencies and who have commented on various aspects of the Manual over the years.

Jane Hodges
Director, Bureau for Gender Equality
ILO, Geneva, June 2012

INTRODUCTION

Aim and objectives of the Manual

The specific objectives of this document are to:

- Support gender audit facilitators with an easy-to-use manual for the organization, implementation and follow-up of PGAs in order to maximize the effectiveness of the methodology; and
- Provide facilitators with a set of tools and practical guidelines to be used during the PGA process. It is important to note that the Manual is designed to be used as a complement to Training of Facilitator courses (TOF) on the PGA methodology. It is not meant to serve as a "do-it-yourself" guide, even for seasoned facilitators on gender issues.

The ILO uses the term "facilitator" for good reason. Facilitators are trained to implement the audit process. They do not dictate nor do they train staff of the audited entity. Since the process is participatory, the term "auditor" is not used, as it could connote judgements and conclusions reached only on the basis of facts, whereas the PGA process also relies heavily on the perceptions of staff.

The target audience

This Manual has been developed primarily to guide and assist facilitators conducting PGAs for and with ILO staff working in the Organization or on technical cooperation projects. However, it can easily be adapted to suit a wide variety of organizations wishing to conduct PGAs at either institutional, programme or project levels. These include:

- ILO constituents, including labour ministries and other ministries and governmental structures, workers' and employers' organizations;
- The United Nations system, which considers gender equality and women's empowerment vital to sustainable development and is committed to making gender equality more measurable in order to strengthen and monitor accountability, increase efficiency and unify gender mainstreaming efforts. To this effect, and in the spirit of inter-agency cooperation, a companion handbook *ILO Participatory Gender Audit: Relevance and use for the United Nations and its agencies* was released early 2011. This publication aims to support and strengthen efforts of joint UN programming on gender equality at country level, particularly in the framework of the UN "Delivering as One" process, of mainstreaming gender into the agencies' individual and collective work, and in highlighting ways to achieve parity between male and female officials in staffing.
- Women's associations and other civil society organizations that wish to carry out self-assessments of their work at organizational levels with the aim of enhancing their capability to implement gender mainstreaming policies and strategies.

Beneficiaries

With the goal of achieving equality of opportunity and treatment for women and men alike, the final beneficiaries of a PGA training are the officials within a particular organization in which PGAs are to be conducted and gender issues are to be mainstreamed, who in turn are at the service of their own stakeholders.

Using the Manual

The Manual is a step-by-step guide to the participatory gender audit process. It accompanies facilitators throughout the process ensuring that they can easily understand, design, organize, conduct, and follow-up on an audit. Ideally, audits are planned over a two-week period to ensure that they are thorough and result in a comprehensive product.

Part One outlines five key areas of analysis for collecting the information that will be needed throughout the audit and for guiding the formulation of the recommendations.

Part Two provides practical information for audit organizers related to the audit process (putting a team together, preparing the activities, carrying out the desk reviews, organizing the interviews, conducting the workshops, and drafting the report and recommendations). These two parts constitute the core of the Manual and provide guidance to ensure consistency and clear information flow between the audit team members and the audited unit.

Part Three comprises a set of participatory workshop exercises with detailed instructions on the objectives, the materials needed and the outcome expected. It also includes suggestions on how to adapt the exercises according to the needs and structure of the audited unit.

Part Four covers the last two segments in the audit process: "At the end of the audit" and "After the audit" and describes what needs to be addressed, including report writing.

Part Five contains a series of annexes, including:

• A description of a participatory gender audit and a brief history of gender audits within the ILO;
• A glossary of key concepts related to gender equality relevant to the audit;
• The four pillars of the methodological underpinnings of the participatory exercises;
• Sample invitation letter;
• Sample gender audit calendar;
• A model audit report structure.

PART ONE: AN OVERVIEW
OF THE PARTICIPATORY GENDER AUDIT

In order to best situate the PGA's role in encouraging transformational change on gender equality within organizations, the evolution of ILO's own experience sets a good example. Below are some key milestones:

ILO policy on gender equality

ILO management declared a strong commitment to gender equality in 1999, which was subsequently captured in a succinct, two-page policy that outlined three action fronts for mainstreaming gender:[2]

Staffing: achieving parity in Professional posts;[3]

Substance: conducting gender analysis and mainstreaming in all areas of technical work;

Structure: foreseeing institutional arrangements and mechanisms for mainstreaming gender into programming, implementation, monitoring, and evaluation.

These "3S's" guide ILO's work on gender equality throughout the Organization.

ILO action plan for gender equality

Having the policy on *what* needed to be done was the first step on mainstreaming gender into ILO work. However, guidance was necessary on what objectives and indicators had to be developed and how the policy was to be implemented. This guidance was proffered in a series of *ILO Action Plans for Gender Equality*, which have been endorsed by the ILO Governing Body as a practical tool for planning and programming.[4] The Plans follow the "3S's" of the policy and are based on the Chief Executives Board for Coordination (CEB) statement on "United nations system-wide policy on gender equality and the empowerment of women: focusing on results and impact".

ILO accountability

The next important element after determining what gender equality measures were needed and *how* these would be implemented was verifying that gender issues were indeed being mainstreamed by establishing an *accountability framework*. This need led to the development of the Participatory Gender Audit (PGA) as a tool to evaluate whether ILO Headquarter units and field offices were adhering to the tenets of the gender equality policy and to implementing the Action Plan. The roll-out of PGAs within the Organization and subsequently to constituents and the UN system was endorsed by the ILO Governing Body. Why the particular emphasis on ILO experience in this PGA Manual? Firstly, it is an opportunity to highlight a documented process that has, since 2001, undergone an institutional transformation with regard to the mainstreaming of gender equality into all aspects of its mandate. The importance of mainstreaming gender into ILO "staffing, substance and structures" is now widely recognized within the Organization.[5]

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[2]   ILO: *Gender equality and mainstreaming in the International Labour Office*, Circular No. 564, Series 1, dated 17.12.1999.

[3]   While absolute parity of 50% women and 50% men at professional posts is desirable, the ILO considers that 60% of posts filled either by men or women is also acceptable.

[4]   The current *ILO Action Plan for Gender Equality 2010-15* is available for consultation at: http://www.ilo.org/gender/Informationresources/lang--en/docName--WCMS_141084/index.htm

[5]   ILO: 285th Session of the Governing Body, GB.285/ESP/7/1, Geneva, Nov. 2002 and 310h Session, March 2011 (GB.310/17/3).

Secondly, it must be stressed that the PGA is but one of the three governance tools on gender equality mentioned in the box. In other words, gender equality policies and action plans need to be in place in order for the PGA to be most effective as an accountability tool. Conducting a PGA does not yield the same results if an organization's policies have not been clearly articulated, and if the modalities for operationalizing the policies have not been put in place. In such cases, officials participating in audit exercises often voice that they hadn't known "what needed to be done in terms of gender equality", nor how to mainstream gender.

A third and equally important reason to emphasize the ILO experience is the institutional endorsement of the PGA at the organization's highest levels, including the International Labour Conference (ILC). The *ILC Resolution concerning gender equality at the heart of decent work*, adopted in June 2009, stated *"Regarding knowledge and capacity building to support gender-sensitive policy formulation, the ILO should:… use the ILO Participatory Gender Audit as a tool for assessing progress towards gender equality, and disseminate good practices arising from its application".*[6] The methodology and its impact are thus well understood by member States, the social partners and increasingly by the UN and its constituent entities.

What is a Participatory Gender Audit?

A Participatory Gender Audit (PGA) is a tool and a process based on a participatory methodology. It promotes organizational learning on mainstreaming gender practically and effectively.

A PGA:

- Considers whether internal practices and related support systems for gender mainstreaming are effective and reinforce each other;
- Monitors and assesses the relative progress made in gender mainstreaming;
- Establishes a baseline for the audited unit;
- Identifies critical gaps and challenges;
- Recommends ways of addressing them and suggests new and more effective strategies;
- Documents good practices towards the achievement of gender equality.

Using this participatory self-assessment methodology, PGAs take into account objective data and staff perceptions of the achievement of gender equality in an organization in order to better understand concrete and unsubstantiated facts and interpretations. Audited units receive a preliminary presentation and a full report on the findings.

The key components of the methodology are:

- an extensive desk review;
- semi-structured interviews with staff of the audited unit at all hierarchical levels; and
- a collective workshop.

Each of these components will be addressed in subsequent chapters.

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[6] ILO: Provisional Record No. 13 – Report of the Committee on Gender Equality – Sixth item on the agenda: *Gender equality at the heart of decent work* (General Discussion), ILC 2009 98th Session, Geneva, 2009, Paragraph 52 (f).

Management environment and "beyond gender" issues

PGAs often serve as entry points for the discussion of wider substantive and operational concerns. Sometimes issues are highlighted which are beyond gender, such as:

- The organizational culture of overwork;
- Tight deadlines;
- Long hours at the office; time pressures;
- The "bead curtain syndrome" (where people are only in contact vertically with their superiors and peers);
- The lack of proactive structures for sharing, learning and adapting.

Since PGAs capture subjective perceptions of staff, every effort needs to be made to cross-check and verify the information obtained. Most often staff members interviewed in PGAs felt that the process provided a good opportunity to signal areas for improvement in terms of the key management functions of planning, coordination, control and motivation. As a result sometimes a large number of PGA findings go beyond the analysis of the dimensions of gender equality in a unit's work, and at times leaned towards identifying management practices. The promotion of gender equality is possible only when elements of a workplace environment are conducive to the integration of gender concerns, and this environment is cultivated by appropriate management practices.

Thus one question emerges: where does the issue of gender equality enter into the equation of management processes? It is the view of the ILO Bureau for Gender Equality that the backdrop of essential management functions is important for any improvement in terms of equality of opportunities for women and men. This principle is upheld in the methodology of the PGA. Audit Facilitation Teams may raise issues on practices for a unit's management to address with the appropriate guidance. It is critical to emphasize that when overall management practices encourage diversity, foster good coordination and communication and maintain a high level of motivation, they create an environment necessary to the promotion of gender equality issues. To this effect, the PGA itself is positioned as a tool to improve management practices and a unit's performance on gender equality and should be seen as one element on a continuum of good management practices.

Aim and objectives of PGAs

The overall aim of a PGA is to promote organizational learning on how to implement gender mainstreaming effectively in policies, programmes and structures and assess the extent to which policies have been institutionalized at the level of the:

- Organization
- Work unit[7]
- Individual

The PGAs objectives are to:

- Generate understanding of the extent to which gender mainstreaming has been internalized and acted upon by staff;
- Assess the extent of gender mainstreaming in terms of the development and delivery of gender-sensitive products and services;
- Identify and share information on mechanisms, practices and attitudes that have made a positive contribution to mainstreaming gender in an organization;
- Assess the level of resources allocated and spent on gender mainstreaming and gender activities;
- Examine the extent to which human resources policies are gender-sensitive;
- Examine the staff sex balance at different levels of an organization;
- Set up the initial baseline of performance on gender mainstreaming in an organization with a view to introducing an ongoing process of benchmarking to measure progress in promoting gender equality;

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[7] The term "work unit" is used loosely. It could refer to a small organization or an office, or to a department, a branch or other structures within an organization (a programme or project, for example). In order to simplify the references to these multiple structures, this Manual will refer to work units to connote the entity that is being audited.

- Measure progress in implementing action plans on gender mainstreaming and recommend revisions as needed; and
- Identify room for improvement and suggest possible strategies to better implement the action plan.

The main outcome of a PGA is a report that includes the key findings regarding the work unit, its good practices in mainstreaming gender issues and a set of recommendations for performance improvement and concrete actions for follow-up by the audited unit/organization. Moreover, the audit methodology is very useful and can be used by facilitators in other settings to promote reflection, analysis of experiences, and learning that initiates change. The participatory approach ensures that participants learn how to critically assess their attitudes and practices and to develop ideas on improving their performance on gender equality.

In summary, a PGA:

- Enhances the collective capacity of an organization to examine its activities from a gender perspective and identify strengths and weaknesses in promoting gender equality issues;
- Helps to build organizational ownership for gender equality initiatives; and
- Sharpens organizational learning on gender through a process of team-building, information sharing and reflection.

Five key areas guide the audit analysis

Under each area, guiding questions help facilitators elicit important information.

The following five Key Areas represent the focus of analysis during a participatory gender audit. The questions are designed to raise awareness in each key area when conducting the desk reviews, the interviews and the workshops and are intended to familiarize the facilitation team with the issues that will generate important information. They are not to be necessarily used as a checklist or questionnaire, but rather to serve as an aid to facilitators to cover key areas in depth.

Furthermore, although facilitators may use the questions to plan their interviews, they do not have to systematically ask all the questions on the list. They should instead adapt the questions to the situations or individuals interviewed.

It is important that at the end of the PGA enough information will have been collected to enable the audit team to report on **each** of the five areas. For this purpose, the participatory workshop exercises in Part Three indicate which of the five key areas they cover.

Five key areas of analysis

I. Gender issues in the context of the work unit, and existing gender expertise, competence and capacity-building;

1) Context of the audited unit and its relationship to gender issues relevant to the technical area, current gender debate and related gender-initiatives
2) Existing gender expertise, competence and efforts at capacity building

II. Gender in work unit's objectives, programming and implementation cycles, and choice of partner organisations

1) Mainstreaming of gender equality in the unit's strategic objectives, policies, programmes and budget
2) Mainstreaming of gender equality in implementation of programmes and technical cooperation activities
3) Systems and instruments in use for accountability, evaluating and monitoring on gender equality
4) Selection of working partners

III. Information and knowledge management within the work unit, and gender equality policy as reflected in its products and public image

1) Information and knowledge management on gender issues
2) Gender equality initiatives as reflected in the unit's products and public image

IV. Decision-making, Staffing and human resources, and organizational culture

1) Decision-making processes including on gender mainstreaming
2) Staffing and human resources concerning balance of women and men, and gender-sensitive policies
3) Organisational culture and its effects on gender equality

V. Work unit's perception of achievement on gender equality

Perception of achievements on gender equality

3 S's: Substantive issues and gender equality

I. Gender issues and their relevance to the technical areas of the work unit, and existing gender expertise, competence and capacity-building;

I.1) Current national/international gender issues and gender debate

It is important for the PGA to explore the current international and/or national gender issues and gender debate affecting the audited unit's technical areas of work, and the unit's interaction with national gender institutions and women's organizations. Connections need to be made between the international level of gender discourse and the practical implementation of gender equality measures and women's empowerment. The noble ideals expressed regarding gender equality may have little bearing on the current realities of a unit. PGAs aim to create the bridge between the actual and the aspirational.

Guiding questions

- Does the work unit interact actively with its organization's constituents on issues of gender equality?
- Does the work unit interact actively with international/national gender institutions and women's organizations?
- Are officials aware of general recommendations and trends in gender mainstreaming promoted by international/national gender networks? What is the nature of these relationships?
- Does the work unit have contacts with non-governmental organizations (NGOs), including women's associations and academic institutions? What is the nature of these contacts?
- Have discussions been held between the work unit and these representatives to formulate priorities for programming gender equality?
- Has the work unit identified institutions that pose constraints to its promotion of gender equality?

I.2) Existing gender expertise and strategy for building gender competence

Similarly, the PGA will find whether *gender expertise, competence and efforts at capacity building exist within the work unit and are being fostered*. One frequent lament heard in PGAs is that officials would be happy to mainstream gender issues into their work, but they simply do not know how to do so. A stock-taking of gender expertise is useful, and if it is determined that there is indeed a lack of basic knowledge on gender mainstreaming among officials then corrective measures such as training and technical assistance could be considered.

Guiding questions

- Is there a common understanding of gender issues and gender mainstreaming among work unit staff which can be basis of dialogue and performance indicators?
- Are there specific posts and resources for gender specialists/advisory staff in the unit?
- What are the perceived and real levels of expertise regarding gender: knowledge, skills and attitude?
- How is this expertise made available or accessible to staff members?
- How is gender competence distributed between male and female staff?
- Is there a system of gender focal points to which the unit belongs?
- What percentage of gender focal points' time is spent on gender-related tasks?
- What initiatives have been taken by the unit's management to promote capacity building on gender?
- How is learning in the workplace promoted?
- Is learning promoted across and within projects/programmes/sectors?
- Is learning promoted by programme management: backstopping in projects, supervision by programme staff, study tours?
- How much has been allocated and spent on each staff member's gender expertise, competence and capacity building?
- What percentage of each staff member's time is spent on gender-related activities?

3S's: Structural issues and gender

II. Gender in work unit's objectives, programming and implementation cycles, and choice of partner organisations

II.1) Organization's gender mainstreaming strategy as reflected in audited unit's objectives, programme and budget

These key criteria are at a concrete level and feed into a work unit's responsibility to create coherence in programming. Here again, the PGA methodology leads with probing questions that point to practical ways of incorporating gender concerns into programming and budgeting. Engendering programming from the initial stages of formulation will directly affect outcomes and results. Mechanisms to budget for gender are important as well.

Guiding questions

- Is gender equality integrated into the work unit's programme objectives, and, if so, how?
- Do the policies and strategic objectives show that gender is understood as concerning women only or as concerning both sexes and the relations between them?
- Are gender equality objectives formulated and translated into performance indicators and targets at the level of the programme and budget?
- Are financial resources available to carry out activities promoting gender equality issues (gender-specific and mainstreamed)? Are these adequate?
- Have you developed a gender equality action plan through consultation with a range of staff, which is incorporated into an annual plan for the work unit and staff member annual work plans? Are these plans discussed and disseminated?
- Are these choices based on gender analyses, stakeholder analyses or market analyses?
- Has a plan to prioritize gender issues in the sector/region/country been formulated?
- If so, how have these choices come about: through analysis, strategic alliances, historical links, partner organizations' interests, etc.?
- Do the gender related choices influence the general objectives of the programmes?
- Are there gender specific indicators for measuring results? Are these indicators and targets to monitor gender mainstreaming incorporated into monitoring frameworks/mechanisms systematically?
- How are the responsibilities for gender mainstreaming shared at different levels in the work unit?
- Who funds the work unit's activities? Are there funds earmarked for gender equality?
- Does the unit have the possibility to dedicate specific funds to promoting gender equality in its core activities?
- How does allocation of funds happen? Are there specific criteria and is gender one of them?
- How are the different responsibilities for project management allocated?
- Do the unit's staff understand and apply gender-responsive budgeting techniques?

II.2) Mainstreaming of gender equality in the implementation of all projects and programmes

Within the same set of criteria is the mainstreaming of gender equality into the implementation of technical programmes and technical cooperation activities. These lend themselves to detailed analysis of gender aspects, as programmes and projects are embedded with a complete cycle of programming, delivery, monitoring and evaluation. They often serve as model cases for mainstreaming gender and experience has shown that a remarkable amount of work on gender issues can be achieved, especially through technical cooperation. More and more donors are also establishing gender mainstreaming as project requisites, thereby adding to the increasing importance accorded to early diagnosis of gender entry points into project management.

Guiding questions

- How are responsibilities for covering gender issues organized in the work unit?
- What activities are specifically geared towards gender equality? What proportion of the total activities do they represent?
- How have these activities come about? Have they been identified by gender analysis, personnel in the unit, partner organizations or by others?
- Are gender equality objectives reflected in budget allocations?
- Does the implementation report include a budgetary analysis?
- Is the format for budget reporting transparent and disaggregated according to activities, research, area of work, etc.?
- What are the modalities for implementing technical cooperation projects: explicit integration of gender equality, separate programmes, separate project components, separate budget allocations for women and gender mainstreaming?
- Are efforts made to ensure that all technical cooperation projects implemented by the work unit include a gender mainstreaming strategy?
- Is adequate expertise attracted to technical cooperation projects (project coordinators, consultants) to ensure that the gender mainstreaming strategies can be implemented?
- Is there a list showing clearly the gender balance of project managers and the specific financial size of each project? Are there differences between women and men managers in project size or visibility?
- Are staff members encouraged to earmark funds for gender mainstreaming in technical cooperation projects?

II.3) Systems and instruments in use for monitoring and evaluation

Directly linked to programming are the systems and instruments in use for monitoring and evaluation on gender mainstreaming. If the programme and budget elements are not in place for establishing accountability on delivering on gender equality, then it is all the more complex to monitor and evaluate achievements. Analyzing systems will also assist in standardizing reporting expectations on gender equality.

Guiding questions

- What systems, methods and/or programme instructions for planning and reporting does the work unit staff use?
- Is the quality of integration of gender issues facilitated by these systems?
- What are the opportunities and limitations of the existing systems and instruments for mainstreaming gender equality?
- Is sex-disaggregated data collected and used systematically in planning and reporting?
- Are effective financial and administrative mechanisms in place allowing for the tracking of planned and spent resources and planned and completed activities on gender mainstreaming?
- How can the systems be improved in order to better incorporate and monitor gender issues?
- Are management and all staff aware of their own accountabilities for mainstreaming gender?
- Do you have guidelines requiring you to report on gender equality progress in your annual reports?
- Does the financial tracking system include provisions for tracking resource allocation to gender equality (e.g. a gender "marker")?

II.4) Choice of gender-responsive partner organizations

The selection of gender-responsive working partners brings home a strategic aspect of gender impact. Usually a range of institutions are key partners of a work unit, and these partnerships present a tremendous opportunity to promote gender equality. Boosting expertise and cooperation on gender issues through ongoing partnerships is usually needed as part of a long-term strategy. The PGA also explores whether consideration has been given to working with NGOs and women's groups. This is an area to which PGA findings may be able to contribute, in addition to exploring whether partnerships with other UN agencies on gender issues have also been struck.

Guiding questions

- With which organizations does the work unit maintain on-going partnerships?
- Does capacity on gender issues feature as a criterion for partnership selection?
- Are there other organizations that that the work unit has targeted for potential partnerships?
- Would the work unit's delivery on gender issues be enhanced by these potential partnerships?
- What contacts does the work unit maintain with or want to develop with gender-responsive organizations?
- How is your system organized around gender internally and externally. For example, is there a Gender Task Force, a Gender Network or are there Gender Focal Points (GFP) in each programme sector?
- Does the GFP or the Gender Task Force have TORs? Have you undertaken a review of the functioning of the GFP system in your Office?
- Who represents the organization externally for gender equality?

III. Information and knowledge management within the work unit, and gender equality policy as reflected in its products and public image

III.1) Information and knowledge management

Most work units have established modalities for formal information sharing (meetings, e-mail exchanges, reports) and these provide excellent venues for mainstreaming gender. Gender theme groups are also popular vehicles for information sharing with a wider circle, especially if information is then passed to the different stakeholders and partners. Informal channels and networking are also studied. PGAs tease out both formal and informal means for information and knowledge sharing, especially focussing on promoting institutional aspects of communication.

Guiding questions

- Is information generally collected, adapted, disseminated and used in a structured manner? Is there a dedicated official assigned to this task?
- Is sex-disaggregated data used in all areas of work, including staffing and organizational matters?
- Is there an overview of existing documentation on gender equality, and is this widely accessible?
- Is there an overview of available gender training modules/tools?
- Is there a well-stocked, operational documentation centre with a collection of documents and audio/visual materials? Do these include gender issues? Are these materials catalogued and easy to find? Are policy documents on gender available and actively disseminated to the work unit's staff and partner organizations?
- Does the unit have a web page? How is gender represented on the web page?
- If there is a work unit newsletter, does it pay attention to experiences in projects/programmes on gender issues?
- Are learning materials on gender equality made available to staff and partners? In field offices, are these available in national languages?
- Do you have mechanisms in place, such as face-to-face, virtual or other networking approaches such as communities of practice to allow exchange of experience and support between different departments/offices? Are gender focal points and other resource persons included in these networking approaches?

III.2) Products and public image

Gender equality initiatives as reflected in products and public image of a work unit are also important to consider within the context of the PGA. Visibility and advocacy on gender issues among constituents and the general public is essential, so that these issues are not perceived by partners and the public as being the domain of only one or two units.
The use of language that is gender inclusive in promotional material, media releases, speeches delivered will be assessed. Visual depictions of both men and women and girls and boys in pictures and graphics of key documents – especially in atypical stereotype roles – will also be evaluated for contributions to gender equality messages.

Guiding questions

- How do partner organizations and other partner organizations perceive gender issues, and specifically the organization's gender policy?
- What is the image of the work unit among stakeholders regarding gender issues?
- Does the unit project gender issues only as window-dressing?
- Is the work unit aware of criticism from insiders and outsiders on its approach to gender?
- What has the work unit done to inform partner organizations of gender policy developments?

- Has the work unit supported partner organizations' capacity development on gender equality, and on gender balance? How? If not, why not?
- What have partner organizations and other partners done to solicit support on gender issues? How has the unit responded to these demands?
- Are partner organizations and other interested parties satisfied with the audited unit's support of gender issues, and with the unit's insistence – or lack of insistence – on gender equality?
- Do research, advocacy and publicity materials used by the work unit include information from a gender equality perspective?
- Does your senior leadership regularly use its voice to raise and promote issues of gender equality?
- Do you have staff members dedicated to communications and advocacy? If yes, are they trained in gender sensitive communications and able to integrate gender equality into communications strategies?
- Do your communication strategies include specific provisions on eliminating bias and stereotypes that support gender discrimination?

3 S's: Staffing

IV. Decision-making, Staffing and human resources, and organizational culture

IV.1) Decision making processes, including on gender mainstreaming

Decision-making – both formal and informal processes – is a key management area and one that feeds much information in the PGA. This criterion is particularly relevant where multiple stakeholders are involved in implementation and decision-making processes may not be clear. Decision-making can be difficult and complex in times of transition and crises, and many organizations have not been spared cost-saving measures. These can take their toll in terms of both human and financial resources, and regrettably in some cases work on gender equality has suffered as well. It is precisely for this reason that institutional commitment to working on gender issues should be upheld. PGAs are useful tools to uncover areas that need to be strengthened so that decision-makers may be alerted. Structural and staffing decisions that have gender implications can thus be considered. Accountability and leadership that are crucial for gender mainstreaming need to adequately captured within the key areas (See box *Management environment and "beyond gender" issues*, p. 11).

Guiding questions

- How are decisions taken in the work unit? To what degree are people left out or included, partially- or fully-informed, and informed in a timely manner?
- Who is always included in decision-making? Is this selection related to functions, hierarchical position or other factors? What other factors?
- Do men and women participate equally in decision-making?
- Do separate groupings of women and men exist in the work unit?
- How and by whom are decision-makers monitored? Is there any reporting or accountability to other relevant units on gender-related issues?
- Who is involved in developing the gender policy for the work unit? Is it always the same person(s)?
- What part of the unit's official funds is allocated and spent on each official? For example, do women and men officials go on missions with the same frequency?
- Are both women and men decision-makers involved in developing the budget for the work unit?
- Indicate the categories of staff and the percentage of their time they spend on budget discussion and preparation and the gender equality strategy of the work unit?
- How much money is spent on promoting women's representation at senior levels of management and professional staff?

IV.2) Staffing and human resources concerning balance of women and men, and gender-sensitive policies

Staffing and human resources concerning sex balance and gender-sensitive policies are key areas to explore. In the context of PGAs, these criteria are vital to determine whether the importance of sex parity in a work unit is understood and appreciated. Similarly, it is important to explore whether gender-sensitive HR policies are in place and are adhered to, such as policies on work and family balance, telework, maternity and paternity leave, and sexual harassment.

Guiding questions

- What is the sex balance of staff at all levels of the work unit?
- How is the sex balance of staff promoted and maintained, if at all: by positive (or affirmative) action, additional facilities, targets, and training?
- Are initiatives encouraged to be taken by managers to help women to break through the glass ceiling? What are they?
- Are initiatives taken to recruit more men for administrative tasks that are traditionally undertaken by women?
- Are recruitment and selection procedures transparent and gender-sensitive for all types of jobs?
- Does the unit have clearly developed competency definitions on gender equality for use in recruitment interviews or performance appraisals?
- Are staff members made aware of work/family balance policies which support equal gender roles for staff within their families, including both maternity and paternity leaves?
- Does your organization implement policies and provisions that support flexible working arrangements for staff to support equal gender roles?
- Does the work unit respect these family-friendly policies and efforts?
- What is the staff salary distribution in the work unit (sex-disaggregated according to level)? (Note: Grade level may be used as a proxy for salary)
- How are payments to external consultancies distributed in the work unit (sex-disaggregated according to level)?
- How long have the staff members (men/women) been in the same grade?
- Do staff members have access to training opportunities on gender equality? In field offices, are these conducted in national languages?
- In what ways do you think your organization is a gender-equal employer? What kinds of efforts does the organization make to consider other forms of diversity?
- Are staff made aware of their responsibilities for the prevention of sexual harassment at work? How?
- Are cases of alleged sexual harassment dealt with under a general complaints machinery?

IV.3) Organizational culture and its effects on gender equality

Organizational culture refers to the often intangible set of collective behaviour and assumptions that loosely guide an organization. This culture may be formed by the shared values, beliefs, visions, norms, habits, systems, and symbols. Particular organizational cultures, which can have positive or negative aspects, often determine how individuals and groups interact with each other and with external parties. Work units (for example a department or a field office) can have shared characteristics with the broader organizational culture, while also having their own particular culture which might co-exist or even be in conflict with the broader collective. These differences are often due to management styles, including the importance placed on gender mainstreaming.

Guiding questions

- Is the work unit seriously involved in promoting the empowerment of women and men and in changing cultural norms in society?
- Who exerts most influence in the work unit when it comes to whether or not gender issues are taken up or neglected?

- Is attention given to gender-sensitive language and images in all documents produced by the work unit?
- How would you characterize the type of jokes that are made in the work unit? Can people be offended or hurt by these jokes? If so, who is hurt by the jokes (in general terms)?
- Is the work unit on the alert for sexual harassment? Are staff members aware that there are persons appointed to handle confidential issues? Are complaint procedures in place?
- Do the members of the work unit have a shared favorite activity or meeting place for sports, social events, etc.?
- What would be the work unit's ideal personnel profile: qualities, capacities, or commitment? Is this profile equally attainable for men and women?
- How are staff members rewarded for or discouraged from engaging in gender equality issues?
- How does the work unit take personal, family, and social obligations of staff into consideration?
- Are financial/budget matters discussed openly in the organization/work unit?
- Are principles of transparency and accountability (overall and budgetary) followed/encouraged within the organization/unit? Is this depicted in words, actions or both?
- Do you perceive your work environment in the Office to be gender-sensitive? If yes, how? If no, why not?

V. Work unit's perception of achievement on gender equality

Once again, the PGA places as much importance on perceptions of staff members and partners as it does on the facts and figures. This emphasis on perceptions of achievement on gender equality brings to light successes and disappointments along a continuum of efforts made over the years, and so places equality gains and gaps into perspective. It is perceptions that are often the difference between motivated or disheartened champions of gender equality. However, in order to bring in more meaningful experiences rather than a flat cumulative review of perception of achievement on gender equality, it would be useful that this criterion form a unit of enquiry in each of the other key areas of analysis and be included in all areas. Therefore a more accurate evaluation may emerge, for example progress in substantive areas, but increased sex imbalance in staffing.

Guiding questions

- Do work units have ideas about the relative success and outcomes of their work on gender equality? Qualify these perceptions in terms of:
  – Changes resulting from the work done;
  – Their importance;
  – Their relation to the objectives of the gender equality and mainstreaming policy;
  – Their relation to the performance of the work unit, partner organizations and target groups;
  – The objectives of the programme/project;
  – Specifically formulated performance indicators;
  – Achievements in each of the key criteria of analyses.

Exercise for Training of Facilitators: Planning the PGA of XYZ office

In introducing the five Key Areas and ensuring that the participants fully understand them, their inter-linkages and their implications for the PGA report, follow the presentation by the facilitator on five Key Areas with a group exercise.

Suggested time: 90 minutes:

– 40 minutes for sub-group discussion
– 40 minutes for presentations from each sub-group
– 10 minutes for plenary discussion

Group Exercise on Five Key Areas of Analysis:

Divide participants into sub-groups (the number of participants in each sub-group will depend on the size of the overall group)
Each sub-group should appoint a rapporteur to present in plenary
Assign key criteria to the sub-group equitably, bearing in mind that criteria II on programming, evaluation and partnerships is quite heavy, and criteria V on perceptions of achievements on gender equality is mostly dependent on other key areas.

Give the following questions to all the groups:
• You are going to conduct a PGA of the XYZ office
• Considering the areas assigned to you, discuss the following:
  – What would be your sources of information on these areas during the PGA?
  – What kind of documents would you need to look at?
  – Who would you talk to, within the organization and outside?
  – What would be some key questions? (Give 3 key questions)
  – What other sources of information would you consult?
  – What would be some of the possible challenges you might face?
  – Do you think it would be more challenging to obtain information on some of the areas than on others? If so, what would be the three major challenges?

During the discussion, prepare a flip chart for each key area with responses to questions asked above, and present your responses in plenary. When each rapporteur has presented, ensure that other members of the sub-group are asked to complement with any additional information. Then open the floor for discussion prior to moving on to the work of another sub-group. Allow some time for overall discussion in plenary.

PART TWO: THE IMPLEMENTATION PROCESS

PGA stages at a glance

This part of the Manual describes the steps to be followed for a successful PGA. It follows a chronological order and gives detailed information on what to do at each of the different stages of the PGA. Each time a specific document is mentioned (e.g. a letter to be sent, a document to be distributed, etc.) a reference is made to Part Five: Annexes, where a sample draft of the document is provided.

The actual audit period normally lasts 10 working days but the preparatory stage is crucial and is key to the success of the audit.

For the PGA Coordinator

The organization and administration of a PGA needs to be handled by a responsible official or officials. This may be a person assigned within a coordinating structure; for example, in the ILO this would be the Bureau for Gender Equality or a regional or sub-regional gender specialist. In some cases the coordinator is also the PGA team leader. Clearly a number of tasks have to be undertaken in the preparatory phase prior to the PGA. A typical PGA preparatory phase would entail that the PGA Coordinator:

- Corresponds with the work unit that has requested a PGA to determine availability, dates, venue etc.;
- Ensures the appointment of an Audit Focal Point by the director of the unit to be audited. This person would serve as the internal liaison;
- Assists the work unit in planning and preparing for the PGA;
- Identifies facilitators to form the audit facilitation team;
- Forms and coordinates the audit facilitation team;
- Receives the materials for the desk review and distributes these to the audit facilitation team.

For the PGA Facilitators

The PGA is an intensive and time-consuming exercise, and facilitators need to be aware of their commitment. On average, it will take roughly one work month: approximately one week of desk review and preparatory meetings before the PGA, two weeks during the active phase of the PGA, and roughly one to two weeks to draft and polish the report for submission to the work unit.

For the Work Unit

For the work unit that will be audited however, the PGA is not that time intensive. This point needs to be stressed with management and staff of the work unit. Although they should be fully committed to participate in interviews, workshops and the information sessions, their regular work assignments will not be disrupted. It is recommended however that missions be kept to a minimum.

If the *collective* time allotted to the PGA is added up it would be:

One hour — Briefing for all staff of a work unit at the beginning of the PGA;
1.5 to 2 days — Collective workshop or two separate workshops for professionals and support services staff;
Two hours — Feed-back and de-briefing session for all staff at the end of the PGA.

In addition, one hour will need to be scheduled to conduct the semi-structured interviews of each official (or a selection of staff in focus groups if the work unit is large).

DIFFERENT PHASES

Before the start of the PGA

- Two weeks prior to the audit, the facilitation team begins initial review of documents;
- Audit facilitation team meets to discuss practicalities. For example, facilitators who are reviewing a particular document should be assigned to interview officials who are linked to or responsible for it;
- Desk review carried out and outcomes discussed within the team (continuous throughout the PGA).

At the beginning of the PGA

- Audit facilitation team meets the work unit director;
- Audit facilitation team meets the entire work unit.

During the PGA

- Semi-structured interviews carried out with work unit director, senior managers, management/technical staff, and support services staff;
- All staff workshop conducted, or Management staff workshop conducted and Support services staff workshop conducted separately (optional);
- Consultations/interviews are carried out with partner organizations and implementing partners (both internal and external to the organization).

At the end of the PGA

- Preparation of executive summary of audit's findings (often in Powerpoint);
- Debriefing of work unit director;
- Feedback session for all work unit staff.

After the PGA

- Draft PGA report;
- Follow-up on audit recommendations by the work unit and other relevant units, including the development of action plans.

Appointment of a contact person by the director of the unit

The work unit's director is asked to appoint a person to organize the PGA with the gender audit coordinating structure and with the audit facilitation team. The contact person, who plays a key role in the success of the exercise and assists in administrative and logistical preparations, is responsible for:

- Mobilizing the work unit to prepare for the audit;
- Collecting the material and documentation necessary for the PGA desk review;
- Planning the schedule of the interviews conducted by facilitators with all unit staff;
- Organizing the dates and logistics for the workshops for support staff and managerial/ technical staff;
- Serving as the liaison between work unit staff and the audit facilitation team to ensure the smooth functioning of the two-week PGA period.

In the field, the contact person is also responsible for organizing consultation meetings for the audit facilitation team with the partner organizations, implementing partners and women's organizations as well as the logistics of the team's travel schedules.

Responsibilities of work unit contact person

The contact person plays a key role in the success of the PGA.

KEY TO THE PGA'S SUCCESS:
WORK UNIT CONTACT PERSON

Your role is essential. You will provide two very important functions:

1. You will help in the administrative and logistical preparation of the audit;

2. You will serve as the main contact with the audit facilitation team to ensure the smooth functioning of the audit.

Among your tasks will be:
- **Mobilizing the work unit** to prepare for the gender audit;
- **Preparing the gender audit file,** which comprises approximately 30-40 documents and products generated by your unit in recent years;
- **Communicating information** about the PGA to all the members of your work unit;
- **Planning a schedule** for interviews of staff members by the facilitators;
- **Serving as liaison** with the partner organizations, implementing partners and women's organizations chosen by your work unit to participate in the PGA (for the preparation of the invitation letters;
- **Providing an office** for the audit facilitation team and the necessary equipment to ensure that the team can do its work (laptops/notebooks, access to photocopiers, stationery, etc.);
- **Reserving workshop venues,** especially if these are to be held in the field. This helps to ensure the full participation of staff and to prevent disturbances;
- **Providing materials** for the audit team to conduct the workshops: flip charts, markers, brown paper, coloured cards, masking tape, white A4 paper, folders, etc.

Work unit planning and preparation for the PGA

When agreements on the PGA and the proposed dates have been reached and the contact person designated, the work unit staff members are informed so that they can plan their activities accordingly. Staff members are asked to:

- Collect a reasonable cross-section of material for the gender audit file and pass it on to the contact person. This information gathering is crucial in making the main body of documentation produced by the unit available to the audit facilitation team for review.

Call for facilitators to form audit facilitation teams

The ILO uses the term "facilitator" for good reason. Facilitators are trained to implement the audit process. They do not dictate to nor do they train staff of the audited entity. Since the process is participatory, the term "auditor" is not used, as it could connote judgements and conclusions reached only on the basis of facts, whereas the PGA process also relies heavily on the perceptions of staff.

> **"Gender" often equates "women" in common practice**, yet the awareness raising of men is essential and integral to women's empowerment. The achievement of gender equality requires a context in which men and women work together. As gender mainstreaming became the accepted framework for action to achieve gender equality, an interest arose in the role of men and boys as a counterpoint to women-specific approaches and in the significance of "masculinities", or men's attitudes, aspirations and anxieties from a gender point of view.
>
> Taking these considerations into account is important in conducting PGAs and in promoting frameworks and strategies to end sex discrimination. Overcoming initial resistance – by both women and men – to the reassessment of existing power relations between them is essential, including the recognition of men's positive role in gender equality.

There are a number of criteria for the identification and selection of PGA facilitators. Although they do not need to be qualified gender experts, facilitators need to have sound knowledge of basic gender concepts and must be firmly committed to the principles of equality of opportunity and treatment of women and men.

Facilitators also need to possess solid, acquired training and facilitation skills. An ease in conducting interviews and workshops is also necessary in order to ensure the success of the PGA.

Seasoned policy-makers who can advocate for gender issues should also be trained and included in facilitation teams. A balance needs to be struck between higher level professionals and less experienced facilitators. ILO experience shows that having a team leader with strong report writing skills identified for each facilitation team is crucial. Team members are required to write up different sections of the draft report.

Another consideration that needs to be taken into account is the full availability of PGA facilitators when the two-week period of a PGA is determined. Facilitators who cannot commit the requisite time and undivided attention should be assigned to a future PGA.

Experience has shown that each PGA facilitation team of four people would benefit from including at least one man per team. Gender equality is not just about women, and men are gender champions as well. Furthermore, a male/female balance on the PGA facilitation team may reassure any men who are participating in the interviews and workshops and provides the facilitation team itself with both a male and female perspective on issues that are uncovered in the PGA.

The PGA Coordinator calls for volunteers from a pool of trained facilitators to form a team of three or four members. Ideally, the following criteria should be fulfilled:

- Sex balance;
- Some technical knowledge related to the work of the audited unit;
- Experience with PGAs;
- One experienced gender specialist or a gender focal point.

The majority of the other facilitation team members, however, need not necessarily be gender specialists, but they should have shown interest in gender equality issues and should be trained gender audit facilitators.

General tips for PGA facilitators

- Devote the time needed to conduct the PGA in the most effective way. Facilitators should try to ensure their availability to work as a team for the full duration of the audit;
- Know the gender audit process, especially when facilitating an audit for the first time. It is important that facilitators volunteer only to facilitate those exercises with which they feel most comfortable;
- Avoid acting as "gender police", giving the impression that the unit's work in mainstreaming gender equality is being judged. Facilitators should make it clear that their role is to assist the audited unit in self-evaluating their gender capacity and to support it in the identification of recommendations;
- Ensure facilitators do not have a personal agenda while conducting a PGA. It is strongly recommended that a nominated facilitator who has any kind of interest in the unit to be audited should withdraw from the nomination;
- Promote reflection, analysis of experiences and learning that initiates change;
- Ensure that audited staff learn how to critically assess their practices and attitudes and to develop ideas on improving their performance on gender equality;
- Encourage transformation in attitudes and concurrent behavioural changes most needed when advocating for gender equality;
- Balance both objective data and subjective perceptions, because there are always differences between the way people act and the way they *think* they act, just as there are differences between the way organizations act and the way they *think* they act.
- Create non-threatening environments. Critical thinking and learning occur best in open climates of trust. The facilitator's attitude towards participants is largely responsible for setting the tone;
- Protect confidentiality. Do not reveal anything discussed with a staff member to another staff member either in the audited unit or other units. Information should only be shared with other audit facilitation team members.
- Respect anonymity of staff members when drafting the designated sections of the PGA report.

Formation and coordination of the audit facilitation team

To carry out a successful PGA, audit facilitation team members must be able to work together and arrange a division of tasks.

In putting together a team, the gender audit coordinating structure:

- Ensures that facilitation team members are volunteers who have undergone intensive training;
- Assesses individual strengths and preferences;
- Identifies and agrees upon a coordinator of the facilitation team (team leader) and copies all the members in writing;

- Discusses and agrees the distribution of tasks; and
- Encourages the team to meet as soon as possible in order to develop a working rapport.

If the PGA is in the field, travel arrangements and arrival/departure schedules need to be coordinated ahead of time with the audited unit's liaison person.

At the beginning of the PGA

Audit facilitation team meeting
Building the team

At the beginning of the PGA, all team members spend time together preparing the audit. This team-building phase is crucial to the success of the audit. Not only is the PGA a challenging task but the team will also be working together within strict time constraints. Members need to be sure that everyone is willing to work to their maximum capability and that they can count on each other for support. However, there are times when facilitators are not in the same location and cannot meet prior to the audit. This is often the case with PGAs in the field when officials may be called from different geographic locations to comprise a team. In these cases it is advisable that facilitators foresee travel arrangements that allow them to arrive at their destination at least one day in advance of the PGA.

Creating a partnership with the work unit contact person

In the first instance, the team meets the work unit contact person and establishes a solid partnership so that any issues that may arise during the two-week audit period are easily resolved. The contact person should have already made a number of preliminary arrangements (interview schedule, workshop arrangements, consultations schedule, etc.) and these are reviewed together.

Reviewing the PGA methodology and sharing experiences

The team should take advantage of this initial period to review the methodology together and to share individual experiences. Some members may have already participated in previous PGAs or have conducted training courses and workshops. This experience is important in distributing tasks, such as report writing, note-taking during workshops and interviews, or facilitation. The division of tasks may rotate or change as the audit progresses.

Establishing an understanding of what the work unit does

Another important task is to discuss the mandate and the profile of the work unit being audited and to learn about the technical or substantive work performed, such as the research, services or advocacy components of the unit's work. Although in-depth analyses will be conducted during the desk review, a preliminary understanding of the work is useful.

Discussing the PGA as it progresses

From the earliest stages, team members should share issues they have identified that may require more probing and insight. These issues could be explored during the desk review, in the semi-structured interviews and in the workshops. Systematically exchanging findings and ideas among audit facilitation team members is essential, not only in identifying patterns and trends in the way the unit works, but also in building a successful audit team. Audit team members may decide to meet at the end of each day to discuss ways of resolving issues that may have arisen.

Audit facilitation team meets the unit director

The initial meeting between the facilitation team and the unit director marks the official launch of the PGA and normally takes place on the first day.

Arranging and conducting the meeting

This meeting should be arranged and attended by the key contact person. The coordinator of the audit facilitation team opens the meeting by thanking the director for her/his commitment to the PGA. Members of the audit facilitation team then introduce themselves individually to the director and present a short background of their experience, units of origin, areas of specialization, etc. A printed version of this information can also be handed to the director and the work unit staff, if necessary.

Audit facilitation team meets the entire work unit

The audit team should be officially introduced to the work unit staff at a briefing session to be held on the first or second day of the audit. This meeting lends credence to the process and familiarizes work unit staff members with the aims of the PGA and introduces them to the audit facilitation team. Staff members may have questions to ask or concerns to share, and this introductory briefing creates an opportunity for them to interact with the audit facilitation team.

The briefing session is also a good time to distribute the Gender Quality Questionnaire (page 91) with a request that it be completed and returned at this briefing session. Staff members will not have gone through the audit process yet, so their answers will generate a base-line on perceptions of staff members' individual performance on gender equality and their views of how the collective members of the unit are performing on mainstreaming gender.

> **CONDUCTING THE MEETING**
>
> - The meeting should be kept short and focused;
> - Each facilitator makes an introduction to break the ice with the work unit;
> - One facilitation team member provides background information covering, for example, the commitment to the audit, its participatory nature, and other general information.

Preparing for the preliminary feed-back presentation and the report writing

Before starting the audit, it is important that the team:

- Decide on the division of labour for preparing the preliminary feed-back presentation and writing the different sections of the report; and
- Select the person to consolidate the final version (usually, but not always, the team leader) and the different tasks in finalizing the report (transcription of workshop sub-group flip chart notes, etc.).

After the PGA, the facilitation team will write the PGA report, which forms the basis for subsequent action by the work unit and provides a selection of annexes and relevant photos. The director and the staff of the work unit are responsible for considering the implementation of the report's recommendations and for monitoring improvement in gender mainstreaming.

Keeping notes on the PGA in a computer file

The facilitation team members should get into the habit of recording their notes and relevant information in a computer file that will ultimately serve as the basis for the feed-back presentation

to the audited united on the preliminary key findings as well as for the PGA report. It is especially important to transcribe interviews so that these could be collated into a consolidated interview template that corresponds to the elements in the 5 Key Areas of analysis. Decisions can also be taken concerning the structure of the notes and level of detail. Although flexibility is important, the discipline of creating the report skeleton will pay off.

Guiding principles for the report

The facilitation team members should emphasize throughout the PGA that:

- The final report will ultimately be the property of the work unit;
- Work units can choose to share the report or the executive summary with other units, partner organizations and other groups that participated in the audit;
- Work units can make it publically available on the Internet or in some other form for distribution if they choose to do so;
- The report should be completed and submitted to the director of the work unit in a mutually agreed time frame, usually within a month after the end of the "active" phase of the PGA. A hard copy should also be submitted to the gender focal point (if appropriate), along with an electronic copy that should be forwarded to all work unit staff members:
- Efforts should be made to keep the final report within a range of 30 to 40 pages.

Drafting the report

Members of the facilitation team decide how to share the task of drafting the report. Two approaches are outlined below:

- Some teams divide up the responsibility for drafting specific sections between the members. All sections of the draft are then collected and each member reads the text in its entirety and makes detailed comments and suggestions. After this first draft has been reworked, members re-read the entire text prior to final editing and proofreading.
- Other teams may decide that each member should note down bullet points under each section of the report outline as the audit progresses. The bullet points are then revised and combined into a first draft by a member of the team. When the report has been drafted, all members read it and suggest improvements.

See **Part Four** of the Manual for further details on report writing.

What is a gender audit desk review?

The desk review is one of the principal sources of information for the gender assessment of an organization and its programmes. Not only does it provide factual and quantitative information but it also serves to cross-check the qualitative self-assessments and viewpoints expressed in individual interviews, self-assessment questionnaires and participatory group discussions. Hence, an adequate amount of time should be devoted to review a required number of documents prior to conducting the assessment within the office environment.

The purpose of a desk review is threefold:

1. It provides factual and verifiable information to be used as baseline data to complement the results of the PGA interviews and workshops (triangulation);
2. The information that it generates feeds into the participatory process as material for discussion and appraisal by participants; and
3. The desk review establishes a benchmark for gender mainstreaming in future documents.

KEY STEPS IN THE PARTICIPATORY GENDER AUDIT PROCESS

- Work unit volunteers for PGA and sends request to the gender equality coordinating structure;
- Formal commitment is made on PGA dates and focal point contact set up in work unit;
- Audit facilitation team of 3-4 members selected and pre-audit preparations set in motion;
- Initial review of documents begins one to two weeks' prior to audit meetings with the work unit;
- Audit duration in the work unit is two weeks;
- Participatory workshops, interviews, briefings and consultations with partner organizations all undertaken during the two week period;
- Draft recommendations are discussed with the entire work unit on last day of the audit and an Action Plan – if appropriate – is set up;
- Draft report is submitted to the work unit (usually the Director and the audit focal point) within a month for comments on factual content;
- Report is completed and formally addressed by the team to the Director of the work unit by the following month;
- Work unit is responsible for giving effect to PGA recommendations. The gender equality coordinating structure in the organization may be able to provide technical advice on the implementation of the recommendations if so requested.

Model gender audit planning calendar

Day 1 – Monday • Facilitation team meets • Coordination meeting with focal person • Meeting with unit director • Meeting with entire unit staff • Confirm interview schedule for unit staff • Discuss interview questions within team • Discuss document review Start conducting interviews	**Day 6 – Monday** • Conduct all staff (management/technical staff and support staff) workshop (full day)
Day 2 – Tuesday • Conduct interviews and transcribe notes • Prepare skeleton report format	**Day 7 – Tuesday** • Conduct all staff (management/technical staff and support staff) workshop (full or half day)*
Day 3 – Wednesday • Conduct interviews and transcribe notes • Discuss findings from interviews and desk review	**Day 8 – Wednesday** • Consolidate workshop notes and integrate findings into draft presentation and report skeleton • Complete consultations • Conduct interviews with partner organizations (face-to-face or telephone/Skype)
Day 4 – Thursday • Conduct interviews and transcribe notes • Discuss findings from interviews and desk review • Plan presentation and report among team members	**Day 9 – Thursday** • Prepare draft report main points • Finalize presentation for feedback session
Day 5 – Friday • Plan Management/technical staff and support staff workshop(s), As decided with unit management, workshops can either be conducted for all staff or separated into 1.5 -2 days for management and technical staff, and half day for support staff • Prepare materials for workshop • Discuss document review • Confirm consultation schedule with partner organizations	**Day 10 – Friday** • Debrief director • Hold feedback session (about two hours) and make presentation to the with entire unit • Discuss next steps and the beginnings of an action plan • Commit to the date for the delivery of the draft report

WHY review documents?

- to access specific information on policy, programmes, activities, systems and operational aspects;
- to assess the extent to which gender issues are reported in the major documents;
- to assess the extent to which gender equality considerations have been included in the major programme planning strategies and activities, as recorded in the documents;
- to identify progress achieved in relation to gender equality and the empowerment of women and girls as shown in findings of reviews, evaluations and annual reports;
- to assess the gender sensitivity of documents published by the unit; and
- to provide a baseline for comparisons of gender integration into documents through successive years.

HOW many documents to review?

- All key programme documents. (Selection of key documents is to be made in consultation with the audit focal point and gender focal point).
- At least three documents in each of the categories of technical/research report/training manuals; advocacy materials; and administrative documents should be selected.
- The total number of documents reviewed may vary from unit to unit. As a general rule, 30 - 40 documents in total should be reviewed.

WHEN to review documents?

Ideally, the document review should be commenced two weeks prior to the beginning of the actual audit within the office. However, experience has shown that documents are added as the PGA progresses.

How is a desk review carried out?

Team members decide which Key Areas of analysis they will concentrate on. For example, the team member who is going to be responsible for analyzing the gender dimensions of Key Area II (programme and budget, monitoring and evaluation, technical cooperation and partnerships) would pour over documents relevant to those particular areas, while the team member responsible for Key Area III (information and knowledge management, products and public image) would be looking at another set of documents and the web-site content.[8]

The questions noted under the Key Areas of Analysis (pp. 14-22) will serve as guidance, as well as the questions below related to the types of documents analysed.

Before the facilitation team begins its work:

- The work unit collects documents for the PGA file;
- The work unit identifies what it considers to be its "flagship or governance documents". These documents provide a view of the unit's overall objectives and daily activities and should be reviewed by all audit facilitation team members;
- The audit focal point will coordinate the collection of these documents before the facilitation team begins its work to avoid losing valuable time looking for materials;
- The facilitation team coordinator (or the designated team member) distributes the texts according to the team members' expertise and interests, which often coincide with one of the Five Key Areas of Analysis that the team member has chosen. Team members who are in communication with the rest of the team by e-mail receive documents in electronic form;
- When possible, documents that have been produced in other languages should be assigned to audit facilitation team members who master these languages so that a good cross-section of documents are considered;

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[8]   It is also possible to use this desk review as group work in a workshop context.

- It is preferable that team members have access to the work unit's Internet/Intranet web sites, whenever possible;
- The team members receive the documents to be reviewed at least two weeks prior to the audit period so that they can familiarize themselves with the main activities and issues related to the audited unit and begin an initial review two weeks ahead of the official start of the audit.

Tip:

Desk reviews can be accelerated by scanning electronic versions of documents for specific words, by using the "Find" function in Word or PDF. For example, a quick search for "gender, women, men, male, female, discrimination, equality, equity" would reveal where gender was mainstreamed in a document, or not. This does not substitute for reading the document, as it is important to determine in which sections gender issues have not been integrated and to analyse the missed opportunities.

On receipt of their assigned documents, team members:

- Determine the gender sensitivity of the materials using the document analysis tables below;
- Decide how to use the information, i.e., whether one team member should collect all the sheets and fill in the relevant sections of the report skeleton; whether each team member should draft text on the documents they have reviewed, for summary or integration by one team member into the report skeleton; or whether any other method should be used.

Materials for the PGA file

The tables below provide guidance for analyses and space for facilitators' comments should this format be adopted by the facilitation team. However, many more questions may come to mind as facilitators progress with the desk review.

- As all team members will do the desk review, it is useful to develop some common language within the team, for example:
  - No reference is made to gender equality at all;
  - Some reference is made to gender equality, sex or gender discrimination or data are disaggregated by sex or women('s views) are mentioned but without analysis;
  - Gender analysis is provided but inequalities are not addressed by the policy/programme or project/activity;
  - Some gender-specific action to redress inequalities is planned, implemented or evaluated but not in a comprehensive way;
  - Gender analysis and action is adequately and effectively mainstreamed throughout the policy, programme, project or activity;
  - The reviewed document is exemplary or innovative in the way it addresses a gender concerns or problem.

Referring specific passages or giving examples as illustrations is also helpful.

Administrative

- Staff lists including technical specialists, programming and support staff, national and international project staff and others, with categories and main areas of responsibility;
- List of consultants and their terms of references;
- Staff mission reports covering the two months' preceding the gender audit;
- Rules and regulations specific to the work unit, including human resources and staff development policy and procedures;
- Programme and budget documents;
- Office floor plans.

Analysis	Comments
Staffing and human resources	
The staff list shows that there is an even distribution of management/technical staff posts among women and men.	
Women and men are both represented in decision-making positions and roles in the unit (senior management and above).	
Gender focal points and experts are identified on the staff list or on a separate task list, and the percentage of their time dedicated to gender is specified.	
Records indicate that staff have participated in awareness-raising/training/capacity building courses or seminars on gender.	
Staffing and succession planning documents reflect awareness of human resources policies on positive gender action.	
Regulations specific to the work unit demonstrate that measures have been taken to promote a more equal sex balance among staff in the work unit, supplementing the organization's personnel policies and procedures.	
Staff meeting agendas	
Staff meeting agendas show that gender issues are frequently raised and addressed in regular meetings.	
Both men and women actively took part in the deliberations, as covered in the report or summary of the meeting.	
Office floor plans	
The office floor plan shows a fair distribution of choice offices to both men and women.	

Analysis	Comments
Programme and budget	
Programme and budget documents clearly indicate gender objectives and indicators for the unit.	
Programme and budget documents clearly indicate what resources are ear-marked for gender-related work.	
Missions	
All management/technical staff regardless carry out missions regardless of rank and sex if the mission is within their area of technical expertise.	
Mission reports reflect gender issues being raised in the context of the work undertaken, regardless of men or women counterparts.	
Mission reports reflect efforts made to seek out women interlocutors among counterparts in the organizations visited.	
Consultancy	
Terms of reference for consultants stipulate that gender equality issues should be reported upon substantially within the context of their assignment.	
Consultancy projects are given and contracts awarded to both men and women.	
Women and men consultants are remunerated on an equitable basis, using the same contractual criteria.	
Screening and selection of consultants include demonstrable gender sensitivity criteria.	

Technical/substantive work issues

- Key documents, research and publications produced by the work unit;
- Work plans of the work unit;
- Reports of major meetings and training activities with lists of participants;
- Training materials in current use;
- Other relevant documents specific to the work unit.

Analysis	Comments
The document reflects that the work unit has incorporated a gender perspective in its analysis of economic, social, political and environmental factors.	
It shows conceptual clarity on what gender equality, gender mainstreaming, etc., mean.	
It uses and analyses gender-disaggregated data/information.	
It uses gender-sensitive language.	
It takes into account the different experiences of women and men, for example, in the case studies, anecdotal or testimonial materials.	
It distinguishes between a focus on one sex and a focus on gender relations.	
Its references to women and gender equality are substantive, not mechanistic or tokenistic (lip service).	
It treats gender equality as a central issue not as an add-on.	
The document reflects mechanisms for planning, monitoring and evaluating that are conducive to mainstreaming gender equality.	

Information/promotion

- Overview document on the work of the unit, if available;
- Public relations materials, brochures, posters, leaflets, videos, CDs;
- Covers of publications with photographs, graphics, etc.;
- Intranet and Internet web site links;
- Newsletters – electronic and print.

Analysis	Comments
The product[3] gives an overview of the work of the unit (or an aspect of the work of the unit) and projects the image of the unit as gender-sensitive.	
The unit's programme objectives, strategies, activities or results are defined in a gender-specific manner in the information/promotion product.	
The product includes credible references to issues of gender equality as relating to the work of the unit.	
There is a real effort to eliminate gender bias in the overall message of the information/promotion product.	
The product consistently uses gender-sensitive language.	
If graphics are used, they give a gender-sensitive balanced look and do not give a subliminal "masculine" message.	
If pictures are used, there is an equal number of women and men represented or engaged in similar activities.	
If a video or CD is being reviewed, the same number of men and women are interviewed, used as case studies, etc.	
Graphics or photographs used on the web site reflect gender balance.	
The work unit web site includes substantive references to work on gender equality.	
The work unit web site provides information on or creates links to other sources of information on gender issues so as to increase accessibility.	
The work unit uses social media to communicate its messages, including on gender issues.	

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[3] The product could be a promotional booklet, pamphlet, leaflet, CD, video, poster, newsletter, or website, with the objective of informing about and promoting the work of the unit.

Technical cooperation

- Project documents, as approved by the donor;
- Project descriptions, identification and formulation of reports;
- Programme and project evaluation reports (ongoing or recently completed).

Analysis	Comments
The document reflects that the project has incorporated a gender perspective in its analysis of economic, social, political and environmental factors.	
It shows conceptual clarity on what gender equality, and gender mainstreaming mean to the project.	
The document uses and analyses sex-disaggregated data/information in the background situation analysis and justification.	
It uses gender-sensitive language.	
It takes into account the different experiences of women and men, for example, in case studies, anecdotal or testimonial materials.	
It distinguishes between a focus on one sex and a focus on gender relations.	
Its references to women and gender equality are substantive, not mechanistic or tokenistic (lip service).	
The document demonstrates the differential impacts of the project on women and men.	
The document incorporates gender equality objectives as identified in the geographic regions(s) where the project is being implemented.	
It includes the gender equality objectives and indicators to monitor and measure outcomes and impacts on gender equality in relation to the technical areas of the project.	
The document outlines key project activities that serve the interests of men and women equally.	
It outlines clearly what commitment of time and resources are made available for gender mainstreaming, including separate budget allocation.	
The document focuses on women's empowerment and provides for separate programmes and activities.	
The document addresses men's contribution, benefits and behaviour in relation to gender equality.	

Analysis	Comments
The document indicates capacity building for project staff, partner organizations and implementing partners on gender equality concepts and gender mainstreaming.	
It indicates capacity building for national machineries responsible for gender/women and for gender expert organizations on the gender issues in the technical field addressed by the project.	
Lists of participants at meetings held by the project show an equal balance of women and men participants and resource persons at the events.	
Both men and women actively took part in the deliberations, as covered in the summary of the report of project meetings.	
Gender issues were on the agenda of the project meetings, and were considered of importance to the topic being discussed.	

Gender-specific

• All relevant gender-related documentation.

Gender-specific documents:

Does the unit have gender-specific documents?

If so, are they effective tools in helping the unit promote gender equality among your organization's partner organizations?

Assessing the availability and use of documents:

As well as assessing individual documents for their gender sensitivity, those carrying out desk reviews of documentation need to step back and take an overview of the body of documentation produced by the unit and available to it.

• What materials does the unit have on gender issues?
• Are they widely used?
• If so, who uses them and for what purpose?

(These questions can be applied to all the unit's resources on gender, not just those produced by the organization itself.)

A further aspect of documentation that should be examined is where it is located in the institution.

- How accessible are the documents that the unit produces and uses, and to whom?
- Are they public, internal, confidential (password-protected)?
- Can they be seen outside the unit/sector that produced them?
- Are the documents on the gender dimensions of a particular issue produced by the sector/unit working on that issue or only by gender-specific units?

The answers to these questions can provide valuable information about the unit's knowledge and information management.

How to choose documents for the desk review

In consultation with the work unit's audit focal point, the facilitation teams identify the documents that are most significant for the unit's work. They should cover the two to three years prior to the PGA, with the exception of earlier key materials which are still in use.

It is important to review documents that do not deal specifically with gender issues as well as those which do.

- It is the mainstream documents that often do not deal specifically with gender that can yield the most useful information about the ways in which gender issues are integrated into work in general;
- While documents about gender issues and documents with a high level of attention to gender issues can provide valuable examples of good practice, documents which give less attention to gender as a cross-cutting issue, which deal with it only implicitly or marginally, or which leave it out completely, have more to tell us about where change is needed;
- The desk review should not be viewed as a test of the extent of gender mainstreaming detectable in existing, finished documents. The aim is to use the survey of existing documents to establish a baseline or a benchmark for gender mainstreaming in future documents.

Gender sensitivity is determined not only by the information in the documents but also by their perspective, style and tone. Again, it is important to review documents that do not deal specifically with gender issues as well as those which do.

The Five Key Areas mentioned in Part One help facilitation teams to direct their analysis of the PGA file, as well as to conduct the participatory workshops and interviews, and systematize their findings. Grouped under a number of headings corresponding to the main organizational issues to be considered in the gender audit, the questions are a useful guide to the kinds of information the desk review should cover. The desk review yields information on the issues identified for the audit from the perspective of the work unit and can raise important issues, especially when planning the semi-structured interviews and audit workshops.

PRACTICAL TIPS IN CONDUCTING DESK REVIEWS

- Documents identified for review should be divided among the team members so that all have a mutually agreed share of work. On average, each person in a team of four members should be able to review 8-10 documents. The consolidation of findings from the documents at the end of the review is to be undertaken by the team coordinator.

- Different categories of documents provide different sets of information in the five Key Areas. In addition to reviewing the documents for their gender sensitivity, main findings from the information collected from the documents can be cross checked during the interviews and participatory exercises. Documents also provide substantive information on programme designs, management plans, policies, regulations and administrative matters. Important findings from all sources of information should be analysed under the relevant five Key Areas.

- In selecting the documents, it is best to ask the work unit for a full list of documents published by it within the last three to five years. Then select the documents from that list with the help of the audit focal point. This also provides the work unit an opportunity to track all their documents and keep a record from then onwards.

- A document may generate mixed reviews. For example, it may have addressed gender issues in one particular area, while completely omitting information in another area. In another document the visuals may be gender responsive, but the text may be gender blind. It is therefore necessary to exercise judgement in reviewing documents and in recognizing the good practices while pointing to the areas for improvement.

- Since the document review should start a few weeks prior to the actual PGA, this time should be counted as part of the audit process. After completion of the review, the overall discussion on the results of the desk review should be discussed among the team members during the actual audit weeks, and relevant information for the five Key Areas shared.

- In the PGA report, it is important to include and cite information collected – including direct but unattributed quotations if needed – from the documents as supportive evidence wherever relevant, in addition to a separate section where the gender sensitivity of the documents is discussed in some detail.

WHAT IS A GENDER-SENSITIVE DOCUMENT?

The review of documents provides evidence of the work unit's performance in relation to gender issues and is complemented by the participatory activities in the audit. However, the gender sensitivity of the documents is also an important aspect for review.

This is determined not just by the information the documents provide, but also by their perspective, style and tone.

The document analysis tables help facilitators to determine gender-sensitive criteria for most if not all of the documents the facilitation teams are likely to review. An examination of gender equality and gender sensitivity in staffing and human resources development (HRD) issues is carried out during the desk reviews because it cannot be done using the participatory methods in the workshop exercises.

GENDER SENSITIVITY: SOME GUIDELINES

The aim of these guidelines is to help integrate the concerns and voices of women as well as men, and girls and boys, into information, documentation and products.

Crucial questions to address are:
- How does a subject or issue affect males and females differently?
- Why does it affect them differently?
- What is being done about it?

All products should carry this message. So-called gender-neutral/gender-blind materials neither explicitly address issues related to gender and equality between the sexes nor address "double discrimination" against women and girls of specific ethnic or minority groups. Thus, most gender- neutral/gender-blind material implicitly reinforces traditional gender roles and sex stereotypes.

Images

Three key words:
- Equality
- Diversity
- Sensitivity

Images, photographs and drawings should communicate messages that promote gender equality, rather than perpetuate stereotypical roles by portraying, for example, men in power or women as caregivers.

Images should respect diversity in sex-role portrayal by showing both women and men in positions of equal status. For example, are men also shown as caregivers in the family? When men and women are portrayed together, showing men in active, assertive positions and women in passive positions should be avoided. Consider portraying the opposite.

Images should reflect sensitivity towards gender equality and ethnic diversity. For example, photographs portraying global trends should include men and women of different ethnic and racial backgrounds.

Language

Language should be gender-responsive rather than gender-blind and/or sexist. This means that it should include references to both women and men and boys and girls.

Gender-responsive language should be used instead of gender-blind terms, which often results in women and girls becoming invisible. Gender-blind terms, such as "informal economy workers" or "rural non-farm workers", often disguise the fact that women form a large part of these groups. Instead, precise terms should be used, such as "women working in the informal economy" and "boys who are rural non-farm workers" and "young men and women who are facing barriers to…"

Use gender-responsive language instead of sexist terms. For example, instead of "man-hours" use "work hours" or "time worked"; instead of "housewife" use "homemaker"; instead of "seaman" use "seafarer"; instead of "chairman" use "chair" or "chairperson".

Avoid using "he", "him" or "men" as so-called generic terms for both sexes. Instead, use the plural: "Officials wishing to improve their knowledge…" or replace the pronoun with an article: "The consultant to be hired will submit a report…" or alternate between using male and female pronouns: "One employee may be responsible for her aged parents. Another may be responsible for his disabled adult child."

Substance and content of text

The substance and content of the text or message should capture the different impact of events and processes on men and women and girls and boys.

The views of both women and men should be represented. Text should explicitly quote and/or summarize these views and identify them as such. Equal numbers of men and women of equal status should be interviewed.

Data and information should be disaggregated by sex. For example, instead of "informal economy workers" use "men represented 20% of informal economy workers and women represented 80%"; instead of "…all poor farmers said the changes affected their…" use "only 10% of poor male farmers, but more than 45% of poor female farmers said the changes affected their …"

The text or message should address relations between the sexes, including power relations both at work and in other contexts, and describe each group's specific experiences, positions, and needs.

The text or message should promote the goal of equal partnership between men and women in all walks of life: the world of work, at home and in communities.

Preparing for individual interviews
Make the interview process inclusive

The semi-structured interviews are an extremely important part of the audit process. They provide the opportunity to explore individual perceptions in a safe space and to amass a wealth of information to complement the findings from the desk review. The contact person will have already set up a schedule of interviews prior to the PGA, and the facilitation team will have had the chance to study and approve the schedule.

Two interviewers should be assigned to one interviewee. Two sets of ears and eyes will capture more than one, and there is much less possibility for misinterpreting the interviewee.

The interviews should be scheduled for 45 minutes to one hour, with enough time in between for facilitators to have a break. The break can also be used to discuss key impressions and to quickly review the interview notes. It is best not to over-schedule interviews – four interviews per day should be the norm for each interviewer (two in the morning and two in the afternoon). In such a manner, eight interviews could be conducted in one day with an audit team of four facilitators, with each facilitator responsible for writing up the notes from two interviews, One of the two interviewers will type up the interview notes, breaking down the findings into the five Key Areas for ease of access when drafting the report. The second interviewer will review the notes and add or modify according to his/her own interview notes.

When writing up the interview notes, it is useful to draft the text in a way that could then be used directly for the report. Findings from the interview can be written up, good practices identified, citations selected and recommendations already formulated.

In principle, the schedule includes all the work unit staff members so that they feel that they have had a chance to express themselves. However, in practice this may not always be possible if there are only a limited number of facilitators available. If individual interviews with all staff will not be possible, focus groups with 3-4 officials with similar responsibilities may be a good approach.

In such cases, a selection of staff members is made for the interviews. Other staff members should be given the opportunity to be interviewed if they express to the team that they have an important contribution to make. In certain cases, officials may not be available for interviews because of their absence on important missions or during emergencies, and these exceptions need to be taken into consideration as well.

Develop a set of core questions

The audit facilitation team plans a set of core questions for all interviewees so that certain findings can be corroborated or challenged. The desk review serves as another basis for formulating core questions.

It is important to complete the desk review prior to embarking on the semi-structured interviews because it will undoubtedly point to areas that need further probing on gender issues. It should also provide ample material for planning and developing sets of questions that the facilitators can use in their interviews.

The guiding questions offered for the five Key Areas for analysis can also help in formulating a set of questions. However, facilitators should note that these questions are indicative and that they do not have to ask all the questions to each interviewee. Rather they form an inquiry base for facilitators to select from or to which to add their own specific queries.

Assign facilitators to interviews

The facilitation team decides on the process for assigning members to interviews. Creating linkages with the desk review and report-writing assignments is useful. For example, if a

facilitator is responsible for Key Area IV (decision-making, staffing and organizational culture) then it would be advisable that this facilitator interview the HR staff. Similarly, the facilitator responsible for Key Area I (gender debate, expertise and competencies) would probably want to interview the gender focal point and technical officers.

At the beginning of the interview, all interviewers explain the approach of the PGA, the purpose of the interview and its contribution to the gender audit process. Not only does this inform the interviewee but it also sets a professional tone for the session.

Bearing in mind that the interviews will generate a great deal of crucial findings for the PGA report, interviewers should be mindful to ask interviewees about elements that will contribute directly to the drafting. Interviewers can ask interviewees "Would you consider this a good practice?" or "Do you think that this could be a recommendation for improvement?"

Who should be interviewed?

It is essential to interview the work unit director who will be able to provide specific information on the background of the unit, future plans and where gender mainstreaming fits into the overall direction of the work. Set this appointment well in advance, and ensure that both the director and the director's secretary are aware of the need to keep the appointment and avoid interruptions. Start with the work unit director and proceed to interviewing management/ technical staff and support staff. Officials with certain responsibilities should be sought out for interviews as they can speak directly to some Key Areas of analysis (for example, programming, finance, HR issues, information and communication).

Managers and technical staff (both regular and technical cooperation staff) are also interviewed. The desk review provides background material to the work being done by these persons. Ideally, facilitators who reviewed a manager's work should also be assigned to his/her interview.

A wealth of information may be gleaned from interviews with support staff. They have insight into both the administrative background of many decisions taken and the process of gender mainstreaming. At times, they may be reticent about sharing information but they should be assured that their contributions would be much appreciated and kept anonymous.

CONFIDENTIALITY VERSUS ANONYMITY

- When setting up their interviews, auditors should explain to the work unit staff that their contributions are anonymous – staff will not be quoted by name and the source of their contribution will not be revealed to superiors or recorded in the report.

- However, there is a distinction to be made between preserving the anonymity of sources and the confidentiality of the information gathered. Given that the purpose of the PGA is to gather information regarding a unit's work on gender equality and one of the tools at the disposal of the facilitators is the interview process, the information is not deemed confidential if it is to be recorded in the overall findings of the audit.

- Facilitators should avoid situations becoming uncomfortable for staff who have taken risks when disclosing information. For example, a thinly veiled reference to the "opinions of administrative staff" may cause problems where there are only two staff members in the unit. The confidentiality of information that is "off the record" should be respected. If the information is of an extremely sensitive nature, such as harassment or abuse, the facilitator should talk to other team members and assess whether the issues should be brought to the attention of the PGA's coordinating unit and the organization's human resources department.

Conducting individual interviews

Preparation is essential to conducting an interview successfully. Team members who interview infrequently can find themselves as anxious as the interviewee ! To counteract this, they should ensure that they are well prepared. Before the interview, team members should:

• Prepare the interview environment (office or meeting room, eliminate distractions, phone calls, conflicting appointments);
• Review the questions generated by the desk review ensuring that they are sensitive to the interviewee's place in the hierarchy of the unit and tailored accordingly.

The following steps ensure a sense of direction and control during the interview:

Step	What to do	How to do it
1	Develop rapport	• Break the ice with appropriate nonthreatening topics • Be friendly but avoid excessive small talk • Present interview agenda / timing • Let the interviewee know you will take notes
2	Control the interview	• Prevent rambling and unrelated discussions • Make sure the interviewee answers your questions • Use silence rather than avoid it, let the person think !
3	Gather information	• Use a variety of questions and question types • Do not speak less than 10% or more than 25% of the time • Rephrase questions if answers are not clear • Be candid with your questions
4	Seek a balanced picture	• Avoid getting a one-sided picture of the situation • Ask questions to get a balanced picture • Ask for strengths and weaknesses, positives and negatives
5	Take notes	• Get key ideas / information and fill in details later
6	Deal with questions	• Make sure you give enough information to clarify • Do not answer questions if you feel they are inappropriate
7	Close the interview	• Discuss the next steps in the gender audit • Give timeframe for future contact • Leave door open to seek further clarification if needed
8	Complete your notes	• Right after the interview, complete your notes to record examples, anecdotes or any areas for further probing

Five crucial skills for individual interviews

IT'S ALL ABOUT COMMUNICATION

Communication skills are skills that everyone uses every day. The five skills listed below form the basis for conducting effective interviews:

Attending:

Use non-verbal skills, e.g., body language to communicate interest and attention to a person or group. Leaning in, nodding or and indicating that you are following are acknowledging the interviewer and reassuring that the information being given is understood.

Observing:

Watch the other person's non-verbal signals, e.g., body language, reactions, preferences, listening clues. Making eye contact, using pauses to allow time for reflection and observing facial expressions that indicate you are present, focused and engaged.

Presenting:

Interviews are rarely a one-sided affair. Interviewees may also ask questions or request clarifications. Be informative without giving explanations that complicate the issue. Be professional and discreet. Provide additional information after the interview if necessary so as not to lose the focus of the interview.

Listening actively:

- Active listening is listening and responding that focuses the attention on the speaker and improves mutual understanding. It is one of the most important skills of an emotionally intelligent facilitator which builds trust and encourages positive interaction. Be attentive not only to what interviewees say but also to how they say it; take notes and, if necessary, ask for time to jot their comments down; suspend judgement and be neutral; indicate interest non-verbally; pay attention to both what is being said and how it is said to pick up cues to pursue new avenues of questioning. We can listen to understand by quietening our mind and giving 100% of our attention.

Some active listening techniques:

Use a confirming statement

- Let me recapitulate…
- Let me make sure I understand…
- So you want…
- I'd just like to confirm that…

Summarize key facts

- You want to advocate the benefits of a gender neutral policy.
- You'd like to know whether gender mainstreaming will cost you more money
- So finally your application was not considered.

Ask if your understanding is correct

- Did I get that right?
- Is that correct?
- Did I understand you correctly?
- Right?
- Is that it?

Step 4 Clarify misunderstandings (if necessary)

- Thanks for the clarification.
- This was helpful – I understand now.

Questioning:

The key tool for controlling, directing, probing and information gathering.

Types of Questions

Open neutral:
- Casts a wide net
- Tries to gather as much general information
- Solicits more than a "yes" or "no" or other one-word response
- Aims to get someone to talk
- Common lead-ins are "what","how", and "why"

Open guided
- Does not introduce a new topic, but allows to probe further
- Steers the discussion to get balanced view

  #### Examples include:
  - "Could you tell me more?"
  - "Could you give me an example?"
  - "Why was that?"
  - "Could you expand?"
  - "What are the advantages of…?"
  - "What are the disadvantages of…?"

Closed neutral:

- Solicits a "yes" or "no" or other one-word response
- Aims to limit talking or to control direction of conversation
- Useful when specific information needed

Closed guided:

– Need to get a definitive answer
– Aims to reduce equivocation

The **sequence** of asking questions on a particular topic is useful for interviewers. It is often preferable to ask an open neutral question first, then confirm finding with a closed neutral question. This may be followed by an open guided question to probe a particular area that hadn't been addressed by the interviewee, followed by a closed guided question to secure an action or agreement.

For example:

- Describe your interactions when preparing an agenda for an internal meeting. (open, neutral)
- Do gender issues get included on the agenda? (closed neutral)
- What would be the advantages of including gender issues on the agenda? (open, guided)
- Will you now consider including gender in future meeting agendas? (closed guided)

PART THREE : THE WORKSHOPS

Preparing and conducting the workshops

The workshops are organized as soon as the majority of the interviews are completed, usually in the beginning of the second week. At this stage, the facilitators are quite familiar with the workings of the unit. The desk review and the interviews will have provided a great deal of insight into the dynamics of the work unit, and the issues that may need further probing will have surfaced.

Most often the workshop is conducted with all staff of a unit, management, technical and support staff together. This integrated approach yields good results and also bolsters team spirit within the unit. The reluctance of some staff members, particularly support staff to speak freely in front of managers is most often off-set by conducting work in sub-groups so that results are presented by the sub-group and no one individual stands out.

Should there be a preference for separating the staff into two workshops, a maximum of two full days, or a minimum of one and a half days, is reserved for the workshop for management/ technical staff and a half-day workshop is organized for all support staff. This may have advantages so that support staff are encouraged and allowed to express their views freely without feeling constrained by the presence of supervisors and managers. The organizational principles are the same for all workshops, but the selection of exercises may vary with the target group.

The work unit's **contact person** should have already confirmed the participants' attendance, reserved the venue, and provided the support material for the workshops. These arrangements should be checked thoroughly prior to the workshops to avoid unnecessary delays.

Dividing up the work and working as a team

It is important to carefully plan the division of tasks and exercises among members of the facilitation team:

- Team members with strong facilitation skills and experience can take the lead during this stage of the audit;
- Co-facilitators may be designated for different exercises to provide the workshop participants with a variety of styles and approaches;
- Some team members co-facilitate "from the side", contributing expertise and ensuring that certain issues get addressed. Others play "devil's advocate" to animate the discussions;
- Tasks such as taking notes of the discussions and gathering the collective work done on flip charts also should to be assigned to team members;
- All the facilitators should observe the group dynamics among the participants and assess the general mood of the workshop. Non-verbal messages and body language can reveal a great deal;
- All these tasks can be rotated among the facilitators;
- Debriefing meetings among facilitators are held at the end of each workshop day;
- The facilitation team members assess the different variables relating to the work unit (size of the unit, number of staff members, strengths of the facilitation team, etc.), and plan accordingly;
- A workshop agenda is prepared and distributed to ensure that facilitators organize their time judiciously.

Workshop tips for PGA facilitators

One of the main roles of the PGA facilitators is to create an encouraging environment for reflection, analysis and open discussions on the challenges and opportunities faced by the audited unit in mainstreaming gender in its work. They should promote this climate of openness and participation by keeping the sessions fun and interactive, minimizing personality and hierarchy issues, and encouraging opinions that differ from those of the "leader". It is extremely important to ensure that the audit facilitators understand and internalize the following basics of this participatory methodology:

- Encourage discussions of opposing views; facilitators must be willing to gently mediate when necessary in order to carry the dialogue forward. For example, a facilitator may suggest that conflicting opinions of participants are of equal merit and thus each will be documented, and then proceed to ask the next question. A more experienced facilitator may introduce related questions to the unresolved issue in order to advance discussion towards a consensus that is multi-dimensional and accommodates differing views among the participants;
- Utilize good communication and be able to clarify or simplify questions. The facilitator should encourage the participation, contributions and inputs of all members of the group, rather than allow just one or two members to dominate the discussion or answer for the group. This may mean that, at times, the facilitator will invite some participants explicitly for their opinion and thoughts, and may ask others to give 'speaking time' to others who have not yet given their views;
- Encourage reflection and allow for periods of silence between the question and answers, to enable participants to think about their experiences in relation to the question;
- Re-iterate throughout the discussion that there are no 'right or wrong answers' so as to ensure that a tone of openness is maintained;
- Instill a strong feeling of respect throughout the group interactions. This means avoiding sweeping statements or acceptance of existing gender stereotypes and drawing out the expression of the minority perspectives of either women, men or any other groups;
- Address the use of sexist jokes, if any, proactively. When some participants feel threatened, they may use derogatory language. In such cases ask them whether they really believe what they say and why. Ask other participants about their views and discuss the issue, making it understood that disrespectful behaviour is not tolerated as it is counterproductive to gender equality promotion.
- Acknowledge the existence of other grounds of discrimination (e.g. race, ethnicity, religion, socio-economic status, urban-rural differences, disability) and indicate that different forms and grounds of discrimination need to be addressed simultaneously.

IMPORTANT: Facilitators should remind workshop participants that the PGA workshop is NOT a training workshop on gender mainstreaming. The purpose of the workshop is to collect material to feed into the audit findings in order to supplement the information from the desk review and interviews. In addition, facilitators can also gauge the ease and openness of interaction between unit colleagues on gender issues in the workshop Undoubtedly some capacity-building on gender mainstreaming is transmitted when going through the workshop exercises. This is one of the welcome side-benefits of the workshop but it is not the primary purpose.

Workshop exercises

The workshop ensures that certain key concepts are emphasized and that similar information is gathered from each PGA to establish comparative baselines. Awareness of gender issues in the work unit is generated and valuable information for the PGA is obtained. The exercises vary in length, complexity of execution and degree of information generation.

A typical two-day PGA workshop for all staff (management/technical/support) does not allow for all exercises to be conducted. Therefore, their selection and use is left to the discretion of the audit facilitation team. Factors that can inform the team's choice include the need for additional information, the skills and preferences of the facilitators, or the time available in the workshop agenda. For example, if more information is needed on the unit's partnerships on promoting gender equality, then the Venn Diagram exercise could be considered. If additional material is necessary to understand the organizational culture of the unit in respect to gender issues, then Hofstede's Onion would be suitable.

The workshop exercises comprise:

1	Historical timeline
2	Gender knowledge and awareness
3	Evaluating gender mainstreaming in programme design, implementation and monitoring
4	Hofstede's onion/Organizational culture
5	SWOT analysis
6	Venn diagram
7	Ideal organization
8	Barriers Analysis
9	Gender Quality Questionnaire

Sequence of the exercises

The sequence to be followed maximizes the effectiveness of the exercises and builds a logical flow for the workshop:

- Ideally, the workshop would start with a brief introduction of the participants and an ice-breaker, followed by some of the more "stage setting" exercises. Experience has shown that the Historical Time-line exercise creates a broader context for the debate in the workshop. The Gender Knowledge and Awareness exercise is one of the exercises that is useful in bringing out the unit's collective understanding of gender issues, and creates a good opportunity for imparting key concepts and definitions to workshop participants. Therefore it is suggested that these exercises are conducted early in workshop.
- Thereafter, facilitators can choose to use exercises that best fit their information gathering needs. For example, a combination of either the SWOT analysis or Barriers Analysis or Gender Quality Questionnaire can be used with the Venn diagram. Ending the workshop with the Ideal Organization exercise has proven to be very useful; this is a forward-looking exercise and its results often point to the beginnings of an action plan.

The following sample agenda illustrates the possible flow of a two-day workshop:

Day 1	
09:00 – 09:15	Introductions*
09:15 – 09:45	Gender Ice-breaker
09:45 – 10:45	Historical timeline
10:45 – 11:00	Break
11:00 – 13:00	Gender knowledge and awareness
13:00 – 14:00	Lunch
14:00 – 15:30	Evaluating gender mainstreaming in programme design, implementation and monitoring
15:30 – 15:45	Break
15:45 – 16:45	Hofstede's onion/Organizational culture
16:45 – 17:15	Reviewing the Gender quality questionnaire (if the questionnaire had been distributed during the briefing session)

Day 2	
09:00 – 09:15	Recap of previous day and Introduction of Day 2
09:15 – 10:45	Selection of exercises (e.g., Venn diagram)
10:45 – 11:00	Break
11:00 – 13:00	Selection of exercises (e.g., SWOT or Barriers Analysis)
13:00 – 14:00	Lunch
14:00 – 15:45	Ideal organization
15:45 – 16:00	Break
16:00 – 16:45	Conclusions/Closing

* The initial introduction should not be lengthy. The audit facilitation team should have already met the work unit staff to introduce the audit process. In addition, most staff members will have been interviewed as well, so participants should be familiar with the purpose of the PGA. It is suggested that the introduction by participants be kept rather short as well.

Please note that many of these exercises can be conducted successfully by adjusting the time needed for analysis and discussion, depending on how many days have been allocated to the workshop. It is acceptable to either shorten or skip certain exercises in favour of others, and to accommodate the unit's time constraints. Ideally, a two-day workshop will reveal the most information, but shorter workshops will also contribute to the audit findings, especially if the choice of exercises is well matched to the needs for information.

Workshop introductions

All workshops should start with the introduction of participants, even if the colleagues know each other well. Either the participants introduce themselves, or they discuss in pairs and introduce one another. Below are some suggested questions.

Large post-it notes or flash cards should be distributed, and the questions below answered.

Introduce yourself (or your partner) to your group. (Name, title and unit/organization, as appropriate)

1. How is your daily work related to Gender Equality, and/or what percentage of your time is spent on gender issues?
2. What are your expectations of this Workshop or What would be the two most useful results of this workshop for you?
3. What are your concerns regarding this Workshop?

Responses should be kept short to allow enough time for all participants to participate. Therefore it is important that facilitators set this expectation from the very first introductions and if necessary cut short the first speakers so that all respect the time limit.

Gender Ice-Breakers

It is advisable to start workshops in a friendly informal manner and ice-breakers serve an important function in workshop planning. By using ice-breakers that probe gender issues, a convivial atmosphere can be created while already delving into substantive issues of gender equality.

Ice-Breaker: The Gender Chorus *

Suggested time:

30-45 minutes

The groundwork

Purpose of the ice-breaker:

This light-hearted ice-breaker in fact probes a number of gender dimensions as reflected in different cultures. It points to the fact that gender issues permeate all areas of cultures and societies and leads to greater reflection on how gender impacts inter-personal relations. The transition to reflecting on gender issues in workplaces can be probed by asking a few questions such as "How do these cultural biases also impact workplace relations?" "How do cultural stereotypes influence gender perceptions in workplaces?"

Small groups

Plenary
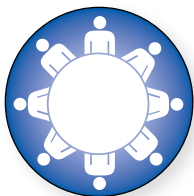
Method:

Divide the participants into sub-groups depending on the overall number of participants. The sub-group should name a rapporteur.

Ask each sub-group to brainstorm and select 5 songs that they think take into consideration gender issues. These songs can be international or national songs, contemporary or traditional ones.

Each sub-group writes down the name of the songs on a flipchart. At least some of the participants should be familiar with the gist of the song, should be able to explain a few of the lyrics and be able to hum a few bars.

The songs and key lyrics are then presented and discussed in plenary.

Analysis:

Both traditional and popular culture reflect strong gender elements regarding relationships (love, marriage, fidelity, scorn), family attachments (parents, children, siblings) social issues (arranged marriages, wealth, social standing) and pre-determined roles of women and men. Each group should pick at least two of the songs they have chosen and offer a deeper analysis of the gender issues raised in these songs.

* (adapted, courtesy of The Development Alchemists Ltd., UK)

Ice-Breaker: The 24-hour clock

Suggested time:

30-45 minutes

The groundwork

Purpose:

This exercise sensitizes the participants to their time-use and to the importance of work andfamily/life balance. Analyzing the use of time available before and after working hours, recognizing the amount of time spent on family and children (feeding. bathing, homework etc), non-remunerated work (gardening, maintenance, cooking, cleaning) and the leisure time left for the individual reveals a great deal. Traditional gender roles, time imbalances and deficits are discussed. Access to and implementation of family-friendly policies in the workplace needs to be raised.
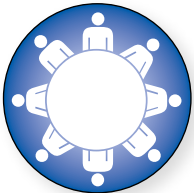
Small groups

Method:

This exercise works well when the number of participants is fairly small (10-12) and where the ratio of men and women in the group is fairly good. As self-reflection, participants are asked to look at their typical, individual work day, from wake-up to bed-time. Then the facilitators draw two clocks on two separate flip-charts and ask the male participants to come up to one of the flip-charts, discuss among themselves and draw the elements of their "composite" day and the women to discuss and draw theirs simultaneously.

Once both groups are finished, a rapporteur for each group presents their clock and a plenary discussion is encouraged.

Plenary

Analysis:

Much of the current debate about working women and men centres around time poverty and the importance of sharing family responsibilities. This ice-breaker usually reveals the expectations that men and women have of themselves and their partners in the distribution of everyday tasks. A 24-clock is used because participants with family responsibilities can be probed to include waking up to feed infants or taking care of ailing family members.
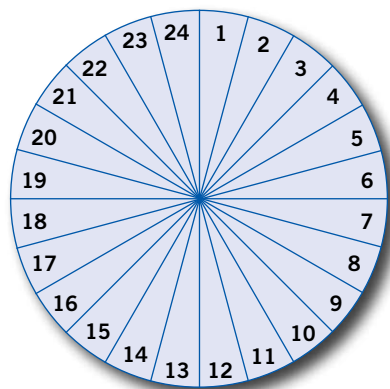
Ice-Breaker: Gender Perceptions and Stereotypes

Suggested time:

30 – 45 minutes

The groundwork

Purpose:

This exercise is a useful ice-breaker and serves to conduct a first sweep of participants' willingness to probe stereotypes. Facilitators give reminders that characteristics that are typically assigned to one sex are not indicative as neither sex is a homogeneous group. Facilitators then need to connect the cultural stereotypes to their impact on relations in the workplace. For example, perceptions about women being caring and nurturing leads to occupational segregation in teaching and nursing, whereas evidence shows that men also are excellent teachers and nurses. Perceptions that men are more direct and decisive points to their predominance in management, whereas experience has shown that women are also capable and competent managers.

Small groups

Plenary
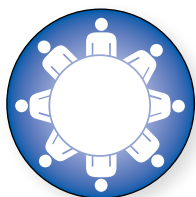
Method:

Participants are divided into sub-groups and asked to answer four questions: "What we like about women?" "What we like less about women?" and "What we like about men?" "What we like less about men?". The examples given may come from all spheres of life, personal, family, society and workplace. There is no need to be "politically correct" and all answers are valid. The sub-groups are requested to record their answers on flip charts, by dividing their paper into quadrants with one question for each quadrant and to nominate a rapporteur.

Each rapporteur then presents their group's work to the plenary highlighting what they appreciated and did not appreciate regarding their own sex and the opposite sex. As rapporteurs succeed each other, they can be reminded to present only the elements that were not raised in the previous groups. The facilitators then encourage a discussion on the findings.

What we like about women:	What we like less about women:
What we like about men:	**What we like less about men:**

Exercise 1: Historical Timeline

This exercise illustrates and underpins the audit findings and recommendations.

We'll find out about:

- Current gender issues, gender debate and the organization's relationship with national gender machineries and women's organizations in the context in which the programme is implemented
- Existing gender expertise and competence and capacity building
- Mainstreaming of gender equality as a cross-cutting concern in the organization's strategic objectives, programme and budget
- Mainstreaming of gender equality in the implementation of programmes and technical cooperation activities
- Systems and instruments in use such as planning/monitoring
- Information and knowledge management
- Choice of partner organizations
- Gender equality policy as reflected in the organization's products and public image
- Decision-making on gender mainstreaming in the organization's
- Staffing and human resources
- Organizational culture
- Perception of achievement on gender equality

The groundwork

Suggested time:

45 minutes – 1 hour

Method:

- Group reflection on historical factors related to gender/women/men which have had an impact at at international, national, organizational and personal levels. These are placed in chronological order on a timeline.
- The timeline is pinned to the wall for the duration of the workshop and participants may continually add information.

Preparation:

- So that the unit can create its own timeline, long rolls of paper or sheets of flip chart paper are joined together and taped underneath their organization's timeline.
- Participants are distributed post-its on which they write one single event per post-it. They can use as many post-its as necessary.
- In as much as possible, three or four different colour Post-its should be used, each colour to represent one level of the time-line (for example, yellow for the international level, blue for the national level, pink for the unit level and green for the personal level). If different colour post-its are not available, then coloured lines can be drawn through Post-its to help identify the levels.
- Facilitators give instructions to fill out the Post-its **one level at a time**. For example, participants are asked to think of all the gender-relevant international level elements they can think of on the yellow Post-its. They then are asked to work on the other levels one by one, identifying each level with a different colour. When they have finished all four levels, invite participants to go up to the prepared timeline and to stick their Post-its in the appropriate rows. Facilitators ask all participants to approach the timeline and request that comments in each level be read out by volonteers. Discussion of interesting points should be encouraged.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
Historical Timeline Exercise **Goal:** Create a historical timeline of the work unit's staff members understanding of the organization's gender policy, gender milestones at international, national levels as well as in the organization and work unit (such as gender-related events or publications). Personal experiences of staff members are also shared. **How:** As historical milestones are identified, participants add them to the historical timeline on the wall in the workshop area. **Time:** 45 minutes-1 hour.	• Long roll of paper or several sheets of flip chart paper joined together and taped to a wall with the proposed chart below. • Different colour Post-its. Alternatively, inputs can be written directly on the paper. • Marker pens.

During the exercise:
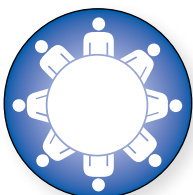
- The historical timeline will contextualize the unit's work on gender including milestones such as gender-related events, publications or policy development.
- This exercise is good for "warming up" participants at the beginning of the audit period. It can be conducted in plenary or in small groups which then come together to share their findings.
- The facilitator invites participants to be as creative as possible in illustrating past events. Some "veterans" of the work unit can help in providing historical information.
- The historical timeline should be perceived as a "work in progress" during the audit period. The advantage of posting it in the workshop area is that participants can constantly build on the information, which can eventually be used to illustrate and underpin the audit's findings and recommendations.

Plenary

Small groups

A practical tip

- Often participants experience particular events (e.g. birth of a child, witnessing unfairness due to discrimination, a particular inspiration, etc.) that have triggered gender awareness or incited a person into action.
- Facilitators ensure that participants stick their own personal milestones regarding these gender issues on the work unit's historical timeline as well. Alternatively, world events or a regional watershed event may also be highlighted on the timeline, or separate and parallel timelines may be created.

The timeline can be drawn at three or four levels:

- **International** (Key international events with signifiance for gender equality)
- **National** (Highlights and milestones in the national development of a particular country)
- **Organizational** (Gender milestones achieved by the audited organization/work unit)
- **Personal** (Gender related highlights of one's personal life)

The timeline chart could be drawn as follows and dates and events included.

Levels	Time Periods						
	Before 1950	**1951 - 1960**	**1961- 1970**	**1971- 1980**	**1981 - 1990**	**1991- 2000**	**2001- onwards**
International							
National							
Organizational							
Personal							

In the plenary session with all participants standing around the time-line, ask participants to read out the inputs at each level and discuss all major events at each level. Make sure that the personal comments are also recognized as these often lead to interesting discussions. This exercise provides a great deal of information for all Key Areas.

Exercise 2: Gender Knowledge and Awareness: How much does the staff know about gender related concepts?

This exercise is an excellent way to encourage PGA workshop participants to reflect and analyze experience-based knowledge and awareness.

We'll find out about:

- Existing gender expertise and competence and capacity building
- Mainstreaming of gender equality as a cross-cutting concern in the unit's strategic objectives, programme and budget
- Information and knowledge management

The groundwork

Suggested time:

Two hours for 20 concepts or one hour for 10 concepts.
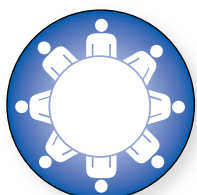
Method:

- Participants are divided up into sub-groups. Facilitators create cards upon which they write one gender-related concept per card. They place the cards in a container or hold out like a fan with the blank side up
- Each sub-group chooses two or three cards and is asked to discuss the concept, identify a definition and provide some examples if appropriate. Each sub-group writes up their interpretation of the concept, the definition and examples on a flip chart, and nominates a rapporteur.
- When all sub-groups have finished their work, the rapporteurs explain their interpretation of the concept to the plenary and open up the discussion so that other participants add to the definition, modify it and/or comment on the concept's importance.

Small groups

OR (in small groups)

- Participants each choose a card prepared in advance by facilitators with one gender-related concept by card and write on the back their definition of its term before returning it to the container.
- Participants draw out a card and read out the concept and definition provided. They then add to the definition, modify it, and/or comment upon the concept's importance.

Plenary

Preparation:

- Facilitation team members read and discuss the concept definitions contained in the Glossary of key gender concepts (see Part Five: Annexes) and clarify any questions or interpretations regarding the concepts.
- Prepare cards – one card per concept.
- Make photocopies of gender glossary for participants.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
Gender Knowledge and Awareness Exercise **Goal:** Assess if the work unit staff has a shared understanding of gender-related concepts. **How:** Explain and discuss gender-related concepts. **Time:** One or two hours (the facilitation team should decide the length of the exercise).	• Cards with gender-related concepts written on them. • Container (optional).

Plenary

During the exercise:

- State the goal of the exercise at the beginning of the session: to ascertain how knowledgeable and aware participants are of gender related concepts.
- Create a dialogue and raise awareness of the importance of the concepts.
- Participants contribute to each other's definitions and, when necessary, facilitators modify or complement their understanding of a concept.
- Ask participants to write down what they have learned, especially as it relates to their daily work.
- Hand out copies of the Glossary of key gender concepts (see Part Five: Annexes) to the participants.
- Keep the pace brisk in order to discuss as many concepts as possible, since there may be a tendency to get caught up in details. Remind the participants to "keep it simple", and reassure them that they will have a clearer picture once most of the concepts have been covered.

A practical tip

Make the exercise fun¾the atmosphere should be animated and should not resemble an examination.

Exercise 3: Evaluating gender mainstreaming in programme design, implementation and monitoring systems

The groundwork

We'll find out about::

- Mainstreaming of gender equality in the unit's strategic objectives, policies programmes and budget
- Mainstreaming of gender equality in implementation of programmes and technical cooperation activities
- Systems and instruments in use for accountability, evaluating and monitoring on gender equality
- Selection of working partners

Suggested time

One and a half to two hours
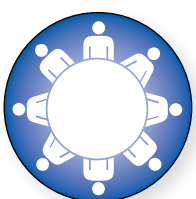
Small groups

Method:

- Participants are divided into sub-groups, each group comprising members, where possible, sharing the same programme or activities;
- Participants select one of the programmes on which they are working at present in order to reflect on the current reality. Each group selects a programme they are involved in or most familiar with.
- Participants are led through the three steps of the table to be filled:
  – Step 1: Programme design and planning
  – Step 2: Programme implementation
  – Step 3: Programme monitoring and evaluation
- Copies of the table are distributed to participants.
- Participants present their findings in a plenary session. They discuss how gender dimensions have been affected because of the approach of their programme or activity, and how strengths and gaps were identified.
- Participants discuss possibilities for changes in perspective and improvement of programme performance on gender equality and empowerment of women and men, boys and girls.

Plenary

Practical Tip

This is one of the most useful learning exercises directly related to work experience and the application of gender concepts. Hence, this exercise should be closely facilitated and participants should be led step-by-step through the analysis.

How is gender included in your programme design, implementation and monitoring systems?

Use the following questions to assess to what extent gender concerns are integrated into your programme or project or activity.

If most of the answers to the following questions are 'yes', it means the programme is gender responsive. If more than half of the answers are 'no' or 'not sure', more attention is needed to make sure that the programme will address the needs and concerns of men and women, boys and girls.

Select an on-going programme or project or activity and examine how it has mainstreamed gender by asking the following questions:

SAMPLE FLIP CHART	SUGGESTED MATERIALS
Evaluating gender mainstreaming in programme design, implementation and monitoring systems **Goal:** Reflect on how gender issues are mainstreamed in different types of programmes and activities/projects **How:** Analyzing different planning and design phases, and implementation and monitoring and evaluation to determine level of gender mainstreaming. **Time:** One and a half to two hours.	• Flip charts for sub-group work. • Markers. • Tape. • Handouts.

Evaluating gender mainstreaming in programme design, implementation and monitoring systems

Reflect, discuss and tick the most appropriate response

	Yes	No	Not Sure
Step 1: Planning and design			
• Is a situation analysis with sex disaggregated data carried out before setting the objectives? Is the analysis conducted from a gender perspective?			
• Do the programme objectives explicitly state gender equality goals?			
• Does the problem analysis identify patterns of gender discrimination and exclusion to describe the situation of women and men, boys and girls?			
• Does the selection of target groups consider gender based needs and interests?			
• Have women and men been equitably consulted in assessing the usefulness of the programme activities?			
Step 2: Programme implementation			
• Do programme inputs reflect gender related responsibilities and expertise?			
• Have financial and/or technical resources been allocated to promote gender equality?			
• Does the programme address issues of inequality and discrimination between girls, boys, men and women and analyse underlying causes of gender inequalities, if these are identified in the situation analysis?			
• Does the programme include strategies to work with boys and men to support women's and girls' rights, and gender equality?			
• Does the programme include training for implementing partners to enable them to identify solutions for the different vulnerabilities facing boys and girls?			
Step 3: Monitoring and evaluation			
• Does the programme evaluation and monitoring require assessments of the differential impact of activities on girls/boys or women/men?			
• Does the monitoring system include qualitative and quantitative gender sensitive indicators?			
• Are gender dimensions reported systematically on programme effectiveness?			
• Are gender experts included as part of a programme evaluation team?			
• Are gender equality issues included in all review meetings?			

GENDER PERSPECTIVES FOR EVALUATING PROGRAMME/PROJECT/ ACTIVITY DESIGN, IMPLEMENTATION, AND MONITORING AND EVALUATION

Mainstreaming perspective

The aim of a mainstreaming perspective is to integrate gender issues into all of an organization's objectives, activities, systems, structures, and resource allocation (personnel and financial).

The ultimate goal of mainstreaming is to promote gender equality. It should not be a "side issue" or a "lower priority" to address once "other problems" are solved. Instead, it should be reflected in, and inform, all activities and initiatives at all levels of the organization.

Women's empowerment perspective

The aim is to promote the equal position of women in the world of work and to further that aim at one or more levels:

Target group

- By promoting the strengthening of women's self-image and the image of women in society;
- By promoting the capacity building of women to enable them to participate equally in all societal activities and decision-taking at all levels;
- By promoting equal access to, and control over, resources and the benefits of productive, reproductive and community activities by affirmative action for women.

Organizations

- By promoting and strengthening the capacity of women's organizations to act in favour of women's empowerment and gender equality;
- By promoting and strengthening the capacity of development organizations and social movement organizations to act in favour of women's empowerment;
- By working to achieve equality and safe and respectful working conditions for women and men in the workplace.

Institutional context

- By promoting changes in the socio-economic conditions in society that often subordinate women to men such as laws, educational systems, political participation, violence against women, and women's human rights.

Gender-blind approach

This perspective ignores the gender biases that exist in society.

In organizations or projects with this perspective, it is mainly men who participate in and/ or benefit from the activities. This can be because the activities undertaken are linked to the "male" domain, interests and responsibilities, or because hindrances and obstacles to women's participation have not been identified and remedied. In both cases, existing gender biases are ignored.

Intentional or otherwise, the consequences are that the less-advantaged sex—usually women—is further disadvantaged and the power enjoyed by the already-advantaged sex— usually men—is reinforced.

Although it has been argued that gender-blind policies and activities have the same effect on women and men, gender analysis and studies have shown that this is most often not the case.

Masculinities' perspective

Organizations or initiatives with this perspective aim to help bring about change concerning the existing norms in society vis-à-vis socially constructed perceptions of masculinity and femininity, and the roles of men and women in their societies.

In projects or activities this approach focuses mostly on male participants, with the aim of moving away from stereotypical norms and values about men and masculinities. Active support of women's struggles for equal rights and gender equality is also part of this approach.

Other relevant definitions

Practical gender needs

Policies, actions and initiatives that focus on practical gender needs address the daily and immediate needs of survival, income and livelihood of men and women.

The objective is not to change existing gender roles or relationship of power. Instead, this approach aims to help fulfil basic needs related to the traditional division of roles and responsibilities. Examples include helping women gain access to literacy courses, increasing their provision of water and food, and providing social services to mothers such as childcare facilities.

Strategic gender interests

Policies, actions and initiatives that focus on strategic gender interests are concerned with changes both at the level of institutions and organizations, as well personal lives and relationships.

Strategic gender interests refer to desired changes in existing relations, roles, tasks and responsibilities of men and women.

The common objective is to increase the control women have in society and in their personal lives. An example includes empowering poor women to increase their social and legal control over assets, and strengthening networks of associations working for gender equality so that they can negotiate with governments for policy and legal reforms.

Exercise 4: Hofstede's Onion / Organizational Culture

We'll find out about:

- Existing gender expertise and competence and capacity building
- Information and knowledge management
- Staffing and human resources
- Organizational culture
- Perception of achievement on gender equality

The groundwork

Suggested time:

One and a half to two hours

Method:

Using an onion as a metaphor for the organization:

- Participants "peel away" layers of the work unit to reach the core¾the organizational culture.
- Participants then identify the aspects of this organizational culture that promote or hinder gender equality and women's empowerment within it.
- This approach is especially effective with support staff, who are often in the best position to explain how a work unit functions the way it does.

Preparation:

Keep the exercise close to local realities to make it relevant:

- Translate terms and/or concepts used during the exercise into the local language, if necessary.
- Identify practical examples from the local context to help explain what "symbols", "artefacts", "expressions", "champions/heroines", and "norms" and "values" mean.
- Prepare cards and flip chart.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
Organizational Culture Exercise **Goal:** Identify the work unit's culture vis-à-vis gender equality. **How:** Peel away layers of an imaginary onion to discover how and why the work unit functions the way it does. **Time:** One and half to two hours.	• Four flip charts with large onion (see example on next page). • Small cards. Differentiate the four layers of the organizational culture by using four different coloured post-its or by writing comments in four different colours. • Markers. • Tape.
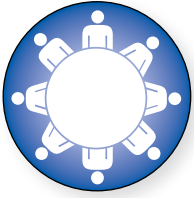
Small groups

Plenary

During the exercise:

- Create an ambience of trust. Remember that organizational culture issues can be sensitive.
- Distribute Post-its to each participant. In as much as possible, four different colour Post-its should be used, each colour to represent one layer of the onion (for example, yellow for the symbols/artefacts, blue for the champions, pink for the rituals and orange for the values). If different colour post-its are not available, then coloured lines can be drawn through Post-its to help identify the levels. In order to simplify, distribute one colour at a time.
- Facilitators give instructions to fill out the Post-its one layer at a time. After participants have completed filling Post-its for one layer, one of the facilitators collects these while the other gives instructions for the next layer.
- NOTE: This part of the exercise is best done before a break in the schedule, such as a coffee break or lunch. While participants are on their break, facilitators can take advantage of grouping similar answers together to see whether a pattern of responses emerges.
- Bring participants back together in plenary to discuss the total image of the organization that emerges from this exercise. Remind participants of the goal of this exercise: to uncover aspects of the organizational culture that promote or hinder gender equality and women's empowerment.

Questions to use in plenary:

The following questions can be used to discuss how the organizational culture of the work unit relates to gender equality:

- Is this a work unit that respects a work/family balance, women as much as men, national as much as international staff, managers/technical staff as much as support staff?
- Are there aspects of the work unit's organizational culture that participants would like to change? How can these changes be brought about?

Other questions that can be used concerning effecting change of the work unit's organizational culture include:

- How do stakeholders view the work unit?
- Do they think it is women-friendly, feminist, genuinely involved in promoting women and men's empowerment?
- Is there critique from outsiders, and/or from insiders?
- What is the organization's reputation as an employer of women, and of men?
- Within it, who influences most whether gender issues are taken seriously or neglected?
- Can people be offended or hurt by jokes within the work unit, and if yes then who?

> **Going beyond gender: This exercise may also bring out questions about differential treatment of support and managers/technical staff, and/or international and local staff – hence "beyond gender" issues.**

HOFSTEDE'S ONION:

Four Layers of the Organizational Culture

LAYER 1
Symbols
Artefacts

LAYER 2
Champions
Leaders
Heroes
Heroines

LAYER 3
Rituals
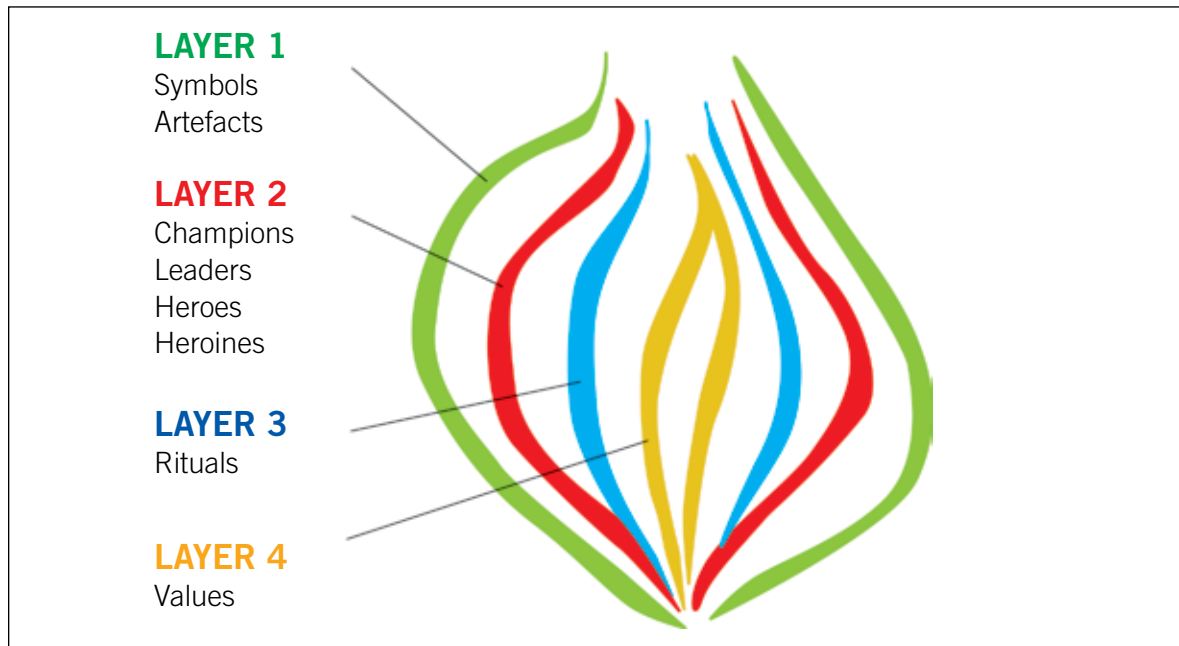
LAYER 4
Values

A work unit has layers like an onion. In this exercise, participants peel away the layers to get to the organizational culture at the core. They then identify aspects of this organizational culture that promote or hinder gender equality and women's empowerment within it.

What do the layers stand for?

LAYER 1: Symbols/Artefacts are words, images or objects that have a meaning only, or specifically, for the members of the work unit.

LAYER 2: Champions, leaders, heroes and heroines are men and women, real or imagined, who have characteristics that are held in high esteem in the work unit or who personify it.

LAYER 3: Rituals are the collective activities that are not strictly necessary to realize the organization's objectives but are considered to be socially essential. Rituals are practices that symbolize what the work unit is: endless¾or no¾coffee breaks, Friday evening socializing, annual meetings, etc.

LAYER 4: Values are the collective preferences of members of the work unit for doing things a certain way.

Hofstede's onion / Organizational culture exercise

Some helpful questions

Symbols and artefacts

- What words come to mind when you think of your work unit?
- Do you associate a certain image or metaphor with your work unit?
- Are these words and images as representative for men as they are for women?

Champions, leaders, heroes and heroines

- Who can be considered exemplary individuals – inside and/or outside – your work unit?
- Do these heroines/heroes convey a certain message on gender?
- What values of the organization do these individuals represent?
- Are there also images of villains in the work unit?

Rituals

- What activities are typical of your work unit?
- What does your work unit do differently from others?
- Who participates in your work unit's meetings?
- How do staff members communicate during office hours?
- Are there social rituals in the work unit?
- Do staff members regularly participate in activities together?
- Do these activities exclude other people?
- Are you excluded from, or do you dislike, some of the rituals?
- Are there jokes typical to your work unit?
- Is it as possible for women as for men to participate in the work unit's rituals?
- Do the rituals promote a safe and respectful working environment?

Values

- What do you consider to be the most important values of the organization?
- What organizational value is most important to you? Is this value important enough to determine whether you continue or stop working with the work unit?
- If you were not correctly treated as an employee, would you know where to go to file a complaint?
- Would you feel free to do so?
- Do you think the organization treats all its personnel equally: men, women, management/technical staff, support staff, and national and international staff?
- Does everyone in the organization have opportunities for job-related training and skills enhancement?

Exercise 5: SWOT Analysis – Strengths, Weaknesses, Opportunities and Threats

The groundwork

We'll find out about:

- Current gender issues, gender debate and relationship of the organization with national gender machineries and women's work units in the context in which the programme is implemented
- Existing gender expertise, competence and capacity building
- Mainstreaming of gender equality as a cross-cutting concern in the organization's strategic objectives, programme and budget
- Mainstreaming of gender equality in the implementation of programmes and technical cooperation activities
- The organization's gender equality policy as reflected in its products and public image
- Information and knowledge management

Suggested time:

One and half to two hours.

Method:

SWOT analysis provides a framework of four elements that reflect a work unit's Strengths, Weaknesses, Opportunities and Threats.

Note:

This exercise is particularly useful when there is a certain issue that needs to be weighed for pros and cons, as the SWOT engages participants to look at both sides of the issue.

Preparation:

- Prepare flip charts with the SWOT analysis image below.
- Prepare copies of the Organizational analysis checklist and the SWOT matrix below.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
SWOT Analysis Exercise **Goal:** Assess strengths, weaknesses of the organization/work unit from a gender perspective and identify opportunities and constraints. **How:** Using an Organizational analysis checklist, analyze project strengths and weaknesses and identify opportunities and constraints. **Time:** One and half to two to three hours.	• SWOT guidelines. • Copies of Organizational Analysis Checklist. • Flip charts. • Cards of four different colours. • Flip chart entitled "What We Have Learned" to use at the end of the exercise.
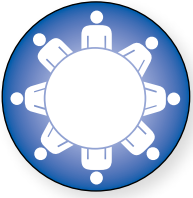
Small groups

Plenary

During the exercise:

- Conduct the exercise in plenary or in small groups followed by discussion in plenary.
- Participants use the SWOT analysis chart to analyze their work unit's strengths and weaknesses from a gender perspective. They then identify contextual opportunities and constraints (Note: In classic SWOT analysis constraints are called "threats").
- Alternatively, facilitators may have identified a specific issue of importance to the unit's work on gender that could benefit from a SWOT analysis. This could be a substantive issue, or an issue related to structure or staffing that impacts progress on gender equality.
- Participants ask the following questions: How can we increase our strengths? How can we reduce our weaknesses? How can we make use of existing opportunities? How can we overcome existing constraints?
- Participants fill in the SWOT images on the previously prepared flip charts. If the exercise is conducted in small groups, these charts are shared in a plenary session. Because participants are often familiar with this methodology, they can often complete it by themselves. Facilitators can be observers or act as "devil's advocates".
- Based on this analysis, participants identify the most important strategic activities for strengthening the work unit's performance on gender equality and women's empowerment or in having an open and frank discussion on the particular issue chosen for a SWOT.

SWOT ANALYSIS	
STRENGTHS Describe the strengths of the work unit. Consider the following factors: • Comparative advantage • Resources **Ask the following questions:** • What are our advantages? • What do we do well?	**WEAKNESSES** Describe the weaknesses of the work unit. Consider the following factors: • Achilles heel • Disadvantages • Resource and capability shortfall **Ask the following questions:** • What could be improved? • For what are we unprepared? • What should be avoided?
OPPORTUNITIES Describe what opportunities your work unit could explore to capitalize on situations such as these: • Changes in the social, economic and political environment • New technology and processes • Competitor weaknesses • Unmet needs of partner organizations • Size, location and strategic positioning • Organizational flexibility and focus **Ask the following questions:** • What are the interesting trends? • What are the best opportunities to act on?	**THREATS** Describe the threats that might prevent your work unit achieving its objectives. Consider these factors: • Resistance to change • Lack of interest, motivation or commitment • Lack of flexibility or focus • Mismatch of skills and resources with the strategic direction • High risks or impossible odds **Ask the following questions:** • What obstacles do we face? • What is our "competition" doing?

SWOT Matrix		
	Strengths Positive characteristics and advantages of the issue or situation.	**Weaknesses** Negative characteristics and disadvantages of the issue or situation.
Opportunities Factors and/or situations that can benefit, enhance or improve the issue or situation.	**S-O Analysis** How can strengths be employed to take advantage of development opportunities?	**W-O Analysis** How can weaknesses be overcome to take advantage of development opportunities?
Threats Factors and/or situations that can hinder the issue or situation.	**S-T Analysis** How can strengths be used to counteract threats that tend to hinder the achievement of objectives and the pursuit of opportunities?	**W-T Analysis** How can weaknesses be overcome to counteract threats that tend to hinder the achievement of objectives and the pursuit of opportunities?

Organizational analysis checklist

All elements below need to be assessed for the effects on the work unit's capacity to promote gender equality:

Status and profile: Status of the work unit; profile; image and identity.

External relationships: Cooperation with other organizations; networking.

Mission: Rationale behind the work unit's existence.

Objectives: What the work unit wants to achieve.

Strategies: How the work unit will achieve its objectives.

Activities/programme: Tasks undertaken to implement the strategies and to achieve the objectives; output of the work unit.

Structure: Organizational chart; positions in the work unit; division of tasks; responsibility and authority.

System: Procedures and tools for programme analysis, planning, monitoring and evaluation; decision-making processes within the work unit.

Personnel: Personnel with the work unit; recruitment; career perspectives; selection and training possibilities.

Knowledge and information: Knowledge and information produced and accessible within the work unit.

Resources: Financial and material infrastructure.

Organizational culture: Attitudes, behaviour, norms and values of the work unit's staff members; the work unit's identity and history.

Exercise 6: Venn Diagram – Are the work unit's internal and external partners conducive to, or an obstacle to, promoting gender equality?

The groundwork

We'll find out about:

- Current gender issues, gender debate and relationship of the organization with national gender machineries and women's organizations in the context in which the programme is implemented.
- Existing gender expertise and competence and capacity building.
- Choice of partner organizations.
- The organization's gender quality policy as reflected in its products and its public image.

Suggested time:

One and a half hours.

Method:

Participants draw a diagram that indicates actors, their importance to the unit, their proximity to, or distance from, each other in the work unit and their roles.

Preparation:

- Draw a circle symbolizing the work unit in the middle of a flip chart.
- Make copies for participants or of the Venn Diagram handout below if one is to be used.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
Venn Diagram Exercise **Goal:** Identify and analyze internal and external stakeholders in organization/work unit/project vis-à-vis promoting gender equality. **How:** Participants create a diagram illustrating stakeholders. **Time:** One and a half hours.	• Flip charts. • Markers.
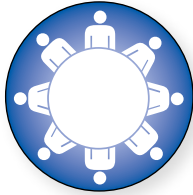
During the exercise:

- Conduct steps one, two and three in small groups of participants.
- Conduct step four in plenary.

Step One: Identifying the work unit's partners and assessing their importance

- List all of the work units internal and external partners (other units and departments within the same organization, constituents and external partner organizations, UN system organizations, donors, NGOs, etc.) with which participants' project or work unit has frequent interaction.
- Assess how important these units/organizations are for participants' work and how frequent/intensive the contacts are.

Step Two: Constructing the diagram

- Draw a circle in the middle of a flip chart symbolizing the work unit.
- Add other circles for the units/organizations that participants identified in step one.

Step Three: Rating the partners in terms of gender equality

- Participants discuss the units and organizations in relation to gender quality.
- They draw a red line between their unit's circle and that of an organization or other unit if they consider that the relationship is driven or influenced by gender equality.
- They draw lines with arrows indicating the direction of the interaction to show if it is a one-way or two-way relationship.
- The size of each circle should symbolize its perceived importance for the participants' work unit.
- The distance of each circle from the main circle should symbolize the frequency of contact.
- Organizations with which the unit may not work but with which there is potential to work may also be represented in the Venn.

Step Four: Deciding how this network can promote gender equality?

- Representatives of the small groups report their findings in plenary.
- Participants discuss the possibilities that this institutional network could help to achieve an improvement in the choice of partners and content of cooperation.

Modify graphics

Example of a Venn diagram

work unit
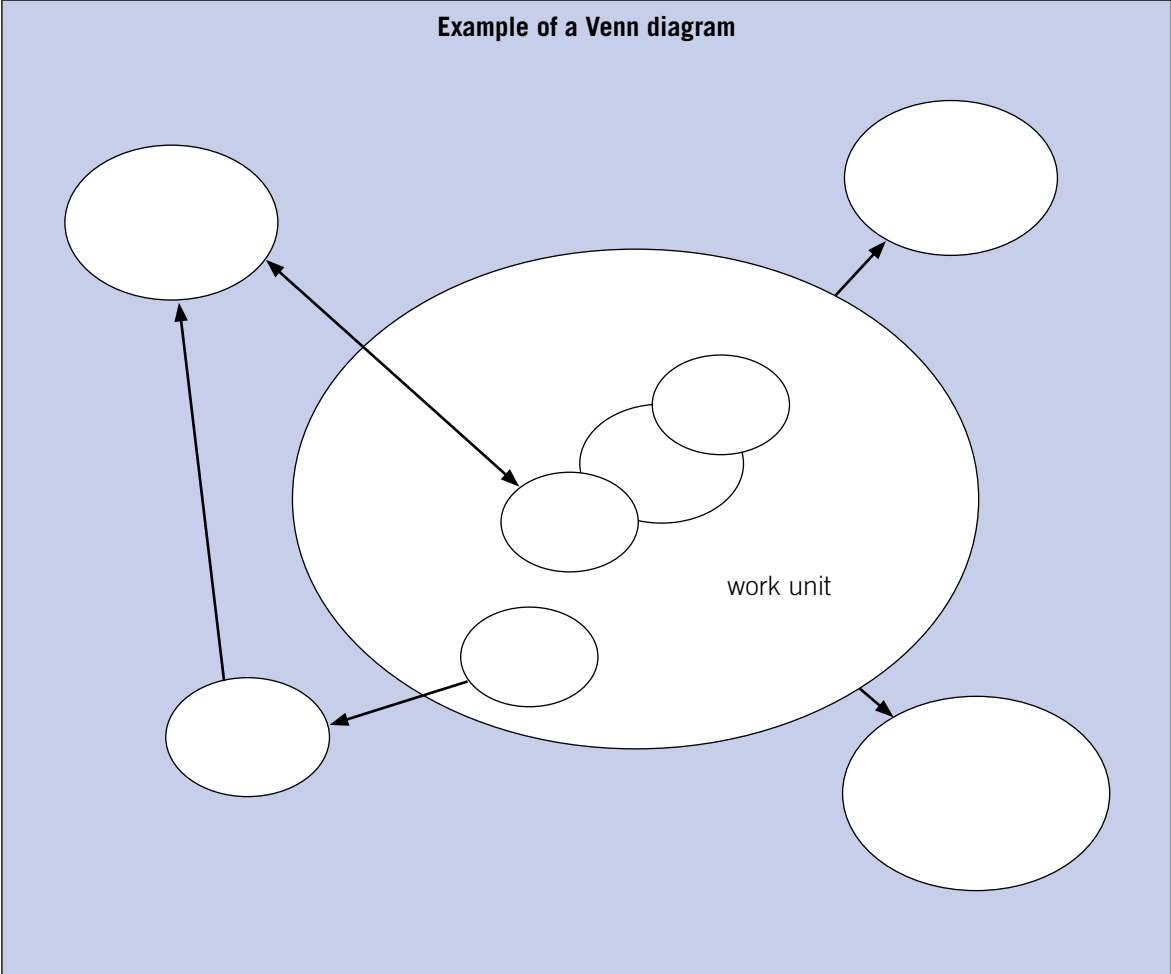
Exercise 7: Ideal Organization

The groundwork

We'll find out about:

- Existing gender expertise and competence and capacity building
- Information and knowledge management
- Staffing and human resources
- Organizational culture
- Perception of achievement on gender equality

Suggested time:

One and a half hours.

Method:

Guided discussion, in small groups and then in plenary, that leads to the development of a vision about the ideal organization and how its work could mainstream gender and promote gender equality.

NOTE:
This exercise lends itself well as a closing exercise for the workshop as it is forward looking and points to the development of an action plan.

Preparation:

- Using the Ideal Organization exercise questions below as a resource, develop a list of questions that are relevant to the particular work unit and that will serve as a basis for the discussions.
- Make copies for participants of the list of prepared questions.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
Ideal Organization Exercise **Goal:** Develop together a vision of the ideal organization and/or work unit in which gender equality is a reality. **How:** Discuss how such an organization/work unit would mainstream gender. **Time:** One or one and a half hours.	• Handout with lists of questions. • Long sheet of paper or flip charts. • Markers. • Tape.
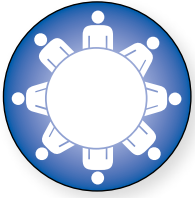
Small groups

Plenary

During the exercise (with a large number of participants):

- Divide into small groups and ask participants to discuss the questions in the handout.

- Ask each sub-group to prepare a flip chart with two columns: one with the heading "Current reality" and the second one with the heading "Ideal Unit". Remind participants to keep the focus on gender issues and to think of the Five Key Areas of Analysis. The sub-groups each nominate a rapporteur.

- In plenary, the rapporteur of each sub-group presents their conclusions. Participants discuss the conclusions and prioritize the most important differences identified between the ideal situation and the current reality, and how the gap can be bridged. Plenary discussion should then focus on the concrete proposals for improvement.

- The facilitator can use questions from the handout (rather than giving each participant a copy) to stimulate discussion and brainstorming.

- The facilitator guides the discussion so that it moves from describing the ideal organization to how to incorporate its characteristics in a concrete way in the work unit's daily work. Encourage free thinking by asking participants not to make judgements about others' views during the brainstorming. Facilitators can pose probing questions such as "Are you satisfied with the situation?", "Why?" or "Why not?"

Ideal Organization Exercise

Some Helpful Questions

Imagine and describe an ideal unit that is able to mainstream gender in all its activities and organizational culture.

- What kind of a reputation would it have?
- What contributions would it make?
- What values would it incorporate?
- What would be its mission?
- How would people interact and cooperate within the organization?
- How would people working within the organization deal with successes and failures?
- How would decision-making be organized?
- What would be taboo?

If you were working in such an ideal unit, what would be your expectations in terms of progress on gender equality?

- In what way would your personal vision on gender come to fruition?
- How could you contribute to the unit's success?

This exercise leads to the development of a vision about the ideal unit, how its work could mainstream gender and promote gender equality and probed how managers and staff could contribute to such a unit.

(Note: The two columns do not always relate horizontally.)

Current reality	Ideal Unit

3. THE WORKSHOPS

Exercise 8: Barriers Analysis

The groundwork

We'll find out about:

- Elements from this exercise may contribute to all five Key Areas of analysis

Objectives of this exercise:

- To encourage collective thinking on how to overcome identified barriers to gender equality
- To enable participants to conduct a causal analysis and understand the underlying causes of barriers and constraints
- To enable participants to identify ways to address barriers and face challenges to gender equality in their work
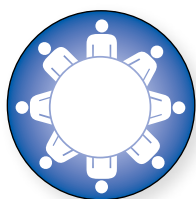
Small groups

Method:

- Participants are divided into sub-groups, with one member as team leader.
- They are asked to identify three barriers/challenges (internal or external) that they face while working on issues of gender equality. Barriers should be identified from staffing and human resource issues (including work and family responsibilities), structural issues related to institutional programme and budget, projects and programmes, and substantive issues related to technical work (the "3S's"). Guidance can also be sought by looking at the five Key Areas of analysis. Alternatively, three groups can be formed wth one area assigned to each.
- Participants discuss each barrier in terms of three layers:
  ✓ the outward manifestation (as it appears now);
  ✓ the immediate cause/s; and
  ✓ the underlying cause/s
- Participants then discuss possible ways to address the barriers at all three levels.
- After their discussion is completed, members of each group move on to other groups in turn and add their analysis and suggestions to discussions of the other groups, thus sharing ideas collectively on all identified barriers and their solutions. The team leaders remain as the "home base" for each of the original groups. The exercise is completed when each group reconvenes at its original point of departure and re-joins its team leader. The original team spends 15 minutes reconsidering the findings with the contributions of all the participants so that a coherent presentation may be made to the plenary.

- Each group's team leader makes a presentation of the collective findings.
- Facilitators encourage discussions on the causes of the barriers and how addressing the causes lead into appropriate and effective solutions.

Plenary

Suggested time:

One and half to 2 hours

How to do Causal Analysis

Select three barriers as subjects for analysis and reflection as mentioned above. Identify a specific problem or manifestation connected to each of the barriers. Capture ideas about possible reasons why the problem exists. Organize the causes in a logical manner identifying immediate, underlying root causes.

Organizing the causes can help identify the connections and main patterns of discrimination, as well as the power imbalances that prevent the realization of gender equality.

Process-wise, this exercise is a tool for consensus building and participation as it requires agreements among participants on the main problems and their root causes.

Features of Round Robin Facilitation Format

There are different variations of this format. The format works nicely with 25-30 persons and takes approximately one and half to two hours. This method should be used particularly with the Barriers/Analysis Exercise or in contexts when an issue is considered a complex problem and needs to be unpacked with suggestions and opinions from everybody in various groups

An issue is discussed and analysed according to a number of distinguishable aspects/ features/ fields/ dimensions in one group.

Groups rotate from one aspect (to be recorded on a flipchart) to another, quickly brainstorming ideas on the particular aspect and after a short time move on to the next aspect (next flipchart).

Time spans allocated decrease from one "brainstorming session" to the next, (since more and more material has already been recorded on the respective flipcharts by the previous groups).

All participants have the opportunity to look into all aspects of the issues under discussion in all areas; thus they can also contribute what they know and think in each area.

Participants experience how much they collectively know. The group can come up with more, complex and innovative ideas than each member individually; therefore the collective wisdom is most often greater than the sum of each individual contribution. Ideas of expressed by some participants may trigger and cross-fertilize ideas of others and lead to richer and more creative solutions.

The Round Robin should end with each group returning to its point of departure (and original flipchart). There they work for another 15 minutes, reviewing all the comments and ideas that subsequent groups have added and prepare a short presentation delivered in plenary on behalf of the group by the team leader.

Round Robin Plenary Discussion on potential solutions

Facilitators may ask the following questions to keep the participants focused on solutions:

1. Within this thematic area, what specific measures or actions can you take?
2. Who will be your target groups for each intervention suggested?
3. How will you carry out the interventions: Discuss in terms of 4 factors:
    (i)   Areas of action
    (ii) Main actors concerned
    (iii) Feasible timeline (short/mid/long term)
    (iv) Support mechanisms needed

SAMPLE FLIP CHART	SUGGESTED MATERIALS
Barriers Analysis Exercise **Goal:** Develop a collective understanding of the obstacles to achieving gender equality in the workplace. **How:** Identify the obstacles to mainstreaming gender and brain-storm how these may be overcome. **Time:** One or one and a half hours.	• Handout with lists of questions. • Long sheet of paper or flip charts. • Markers. • Tape.

Exercise 9: Gender Quality Questionnaire: What is the quality of the unit's implementation of the organization's gender policy?

We'll find out about:

- Existing gender expertise and competence and capacity building
- Mainstreaming of gender equality as a cross-cutting concern in the unit's strategic objectives, and programme and budget
- Systems and instruments in use such as planning/monitoring
- Mainstreaming of gender equality in the implementation of the unit's programmes and technical cooperation activities
- Choice of partner organizations
- Information and knowledge management
- Gender as reflected in the work unit's products and public image
- Staffing and human resources.
- Organizational culture
- Perception of achievement on gender equality

The groundwork

Suggested time:

A half-an-hour to fill out the questionnaire, preferably at the briefing session on the first day of the PGA and one hour to conduct the exercise.

A pratical tip:

If this exercise is not chosen by the facilitators for inclusion in a particular PGA workshop, the questionnaire can nevertheless be distributed and the results can be included in the de-briefing session to the audited unit. The computer-generated graph can be included in the Powerpoint presentation in giving feed-back on the fifth Key Area of analysis "Perception of Achievement of Change."

Method:

- The questionnaire focuses on the competence of both individual participants and the work unit as a whole vis-à-vis gender issues and mainstreaming.
- In plenary, participants try to reach a consensus on the quality of the work unit's performance regarding gender issues, and formulate recommendations to improve performance.

Preparation:

- Facilitators must have an understanding of the programme of the work unit before conducting the exercise, which is achieved by completing the document review and conducting the semi-sructured interviews.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
Gender Quality Questionnaire Exercise **Goal:** Reflect on and discuss the quality of the work unit's gender mainstreaming, reaching a consensus, if possible. **How:** Participants complete an anonymous questionnaire and then discuss the results in plenary. **Time:** A half hour for previously completing the questionnaire and one hour for conducting the exercise.	• Scoring sheet. • Calculator. • Flip chart or computer-generated quality graph. • Two markers of different colours. • Copies of the questionnaire.

- If necessary, adapt the questionnaire below to the particular work unit.
- After the questionnaires have been adapted to the particular work unit, prepare the Scoring sheet. Calculate: the individual maximum score attainable per participant for each category of questions (maximum points per question multiplied by number of questions used); and the total (group) maximum score for each category of questions (individual maximum scores multiplied by the number of participants in the group).

Example:

Category 1A	Maximum points per question	X	Number of ques-tions	X	Number of partici-pants	=	100%*
*The results of the scoring should be presented in a graph. Facilitators familiar with Microsoft Excel may choose to construct this graph electronically.							

During the exercise:

- Promote the participants' critical assessment of the quality of their own and the work unit's activities in the area of gender mainstreaming.

Plenary

A practical tip

Participants may need to be reminded that this is not meant to be a "scientific" exercise. Rather, it is attempting to highlight the subjective differences in perception that may exist in a particular work unit and to help facilitate a dialogue among staff members.

Step One: Completing the questionnaire (Suggested time: 30 minutes)

- Participants anonymously fill out the questionnaire and return it to the facilitators for processing and use.
- The two aspects of quality considered in the questionnaire are personal and organizational.

- Categories 1, 4 and 5 are each divided into two parts: personal aspects (A) and organizational aspects (B)
- Category 2 concerns organizational aspects
- Category 3 concerns personal aspects

Step Two: Tabulating the results

- After the questionnaire has been completed, participants' individual scores per category are added together to get the total scores for the work unit.
- Record the answers on the scoring sheets. The total score for the work unit for each of the five categories is then calculated as a percentage of the total possible or maximum score (100%).
- The percentage can be illustrated in a bar graph called the "quality graph", in which different coloured bars are used for A and B in each category. Facilitators familiar with Microsoft Excel may choose to construct this graph electronically.
- A comparison of the results. What is most striking about the differences between the categories? How do these differences come about?
- Why do the personal and organizational scores differ?
- Which questions from the questionnaire would you like to discuss more in-depth?
- Which questions did you find most difficult to answer?
- Are you surprised by any of the outcomes? (Suggested time: 30 minutes)

Scoring sheet			
Category	Score total	Maximum score	Percentage
1A			
1B			
2			
3			
4A			
4B			
5A			
5B			

Quality graph example

Step Three: Plenary discussion

1. Summarize the scores and encourage discussion.
2. Focus discussion on the meaning of the scores. Questions can include:
   - Why are they high or low?
   - Do the participants identify with the scores?
   - Do the scores indicate that they are competent enough in gender issues and that the work unit is competent enough?
   - What have they already done to improve their capability?
3. Focus discussion on opportunities for improvement at the individual, team and organizational levels on gender equality. This can be done by allowing five minutes for discussions on opportunities for individual improvement followed by opportunities for the group. The resulting recommendations should be included in the audit report.

Gender Quality Questionnaire
Work unit

1. Expertise and vision

A. Personal aspects

A coherent vision of problems and solutions in the profession/specialty gives structure to expert knowledge. Guided by the following questions, judge your vision and knowledge of gender.

1A.1 The organization has a vision of gender equality. To what extent do you implement this vision?

3 Completely	2 Sufficiently	1 Insufficiently	0 Not at all	Don't know

1A.2 How well informed are you about the content of the organization's gender policy?

3 Completely	2 Sufficiently	1 Insufficiently	0 Not at all	Don't know

1A.3 How important is the gender policy for the achievement of the organization's strategic and operational objectives?

3 Completely	2 Somewhat important	1 Of limited importance	0 Not at all important	Don't know

Score: _____

B. Organizational aspects

These questions seek to elicit the extent to which the organization's gender policy has been translated into your work unit practice, and identify the documents providing evidence of this.

1B.1 How well does your work unit operationalize the organization's gender policy in its programme(s)?

3 More than sufficiently	2 Sufficiently	1 Insufficiently	0 Not at all	Don't have one

1B.2 How important do you think your work unit considers the gender policy to be for the achievement of its objectives?

3 Very important	2 Somewhat important	1 Of limited importance	0 Not at all important	

1B.3 How well does the work unit inform you about the content of the organization's gender policy?

3 Completely		2 Sufficiently		1 Insufficiently		0 Not at all	

Score: _____

2. Accessibility and availability of methods, procedures and/or instruments

Organizational aspects

In the following questions you will judge whether your work unit has sufficient tools, methods and procedures to allow for practical implementation of its gender policy.

2.1 How often is the organization's gender action plan updated?

3 Frequently		2 Often enough		1 Seldom		0 Not at all	Don't have one

2.2a Does the work unit have sufficient information on and practice in the use of instruments to conduct a gender analysis and to incorporate the conclusions of this analysis into all stages of the design process of programmes and projects?

3 Completely		2 Sufficiently		1 Insufficiently		0 Not at all	Don't know

2.2b Based on your answer to the above question, how competent would you say your work unit is in this regard?

3 Very competent		2 Sufficiently competent		1 Not competent enough		0 Not competent at all	

2.3 Does the organization provide its staff with sufficient guidance and information on standards and other instruments regarding gender issues?

3 Completely		2 Sufficiently		1 Insufficiently		0 Not at all	

2.4 Have adequate arrangements been made to allow for the free flow and exchange of information and experiences on gender issues within and between departments and field structures?

3 Completely Adequate		2 Sufficiently adequate		1 Inadequate		0 No arrangements have been made	

2.5 How well does the programming system in your work unit ensure the quality of implementation of its gender policy?

3 Very well		2 Sufficiently		1 Insufficiently		0 Not at all	Don't know

2.6 Is the quality of mainstreaming of gender equality monitored in mid-term performance reports, biennial reports, other reports on technical cooperation, etc.?

3 Yes, always		2 Yes, sufficiently often		1 Yes, but only occasionally		0 No, not at all	Don't know

2.7 Are means (both human and financial resources) available to achieve gender policy aims?

3 Yes, more than enough		2 Yes, enough		1 Yes, but not enough		0 No, none at all	

2.8 Does yor work unit offer opportunities (capacity building/training, direct support, backstopping, literature) to strengthen your knowledge and skills as regards gender issues in your area of expertise?

3 Yes, more than enough		2 Yes, enough		1 Yes, but not enough		0 No, none at all	

2.9 To what extent do specialists and technical experts use their knowledge to improve the work unit's daily work practices and activities with respect to gender equality?

3 Extensively		2 Sufficiently		1 Insufficiently		0 Not at all	

Score: _____

3. Competence of staff

Personal aspects

Staff members of most organizations are expected to be able to apply a gender perspective in their work. In the following questions you judge your own competence to do so within your expertise.

3.1 As a member of the organization's staff, you are expected to introduce gender issues in different stages of programme/project design and implementation at your level. How well do you fulfil these expectations?

3 Completely		2 Sufficiently		1 Insufficiently		0 Not at all	

3.2 Do you have sufficient knowledge of the issues involved in mainstreaming for gender equality to advise others?

3 Yes, more than enough		2 Yes, just enough		1 No, not enough		0 No, none at all	

3.3 How much do you know about the available tools and methods for gender mainstreaming in your work?

3 Everything/a great deal		2 Enough		1 Not enough		0 Nothing	

3.4 How much have you used the available methods and instruments for gender mainstreaming in your work?

3 Extensively		2 Sufficiently		1 Only occasionally		0 Not at all	

3.5 Can you give feedback to colleagues and partner organizations concerning their gender policies and implementation?

3 Yes, very well		2 Yes, well enough		1 No, not enough		0 No, not at all	

3.6 How often do you integrate gender explicitly into your work (for example, in the choice of activities, choice of methods, and the approaches used)?

3 Always		2 Usually		1 Seldom		0 Never	

3.7 Would you be able to formulate selection criteria or terms of reference for external collaborators, and well-directed questions to assess candidates' capability/competence on gender issues, in recruitment procedures, project proposals, etc.?

3 Definitely		2 Probably		1 Possibly		0 Definitely not	

3.8 How often do you request feedback from colleagues or partner organizations when you try to integrate gender issues into your work?

3 Always		2 Often		1 Occasionally		0 Never	

3.9 Do you make effective and timely use of external expertise concerning gender (gender consultants, technical support, internally available expertise)?

3 Yes, always		2 Yes, occasionally		1 Only seldom		0 No never	

Score:_____

4. Culture of the organization

The organizational culture of the work unit contributes to how and what work is accomplished. Guided by the following questions, assess how you personally contribute to the organizational culture, how does your wok unit deal with gender in its organizational culture, and how this is expressed in contacts with partner organizations.

A. Personal aspects

4A.1 How much attention do you pay to ensuring respectful working relations between men and women in your work unit?

3 Very much		2 Some		1 Not enough		0 Not at all	

4A.2 Have you undertaken activities to identify the existing interests of programme/project staff and any problems they may have in mainstreaming gender?

3 Yes, many		2 Yes, some		1 Yes, but very few		0 No, none at all	

4A.3 When you identify problems affecting colleagues (both male and female), do you take action?

3 Always		2 Sometimes		1 Seldom		0 Never	

Score: _____

B. Organizational aspects

4B.1 Does your work unit do enough to discourage expressions of gender inequality (for example disrespectful computer screensavers, posters and inappropriate comments or jokes)?

3 Yes, more than enough		2 Yes, enough		1 No, not enough		0 No, nothing at all	

4B.2 How would you rate your work unit's active approach to promote gender equality and respect for diversity in decision-making, behaviour, work ethos and information?

3 Excellent		2 Sufficient		1 Insufficient		0 No such policy	

4B.3 Does your work unit effectively promote the organization's policy to prevent and deal with harassment in the workplace?

3 Excellent		2 Sufficient		1 Insufficient		0 Does not promote	

4B.4 Has your work unit removed obstacles that would have prevented any functions or positions from being fulfilled equally by women and men? If so, how well has this been done?

3 Completely		2 Sufficiently		1 Insufficient		0 Not at all	

Score: _____

5. Service delivery of partner organizations and other partners

A. Personal aspects

5A.1 Have you undertaken activities to identify the attitudes of partner organizations towards working in a gender-sensitive manner, and/or the obstacles hindering such work?

3 Yes, many		**2** Yes, some		**1** Yes, but very few		**0** No, none at all	

5A.2 How often do you engage in a dialogue with partner organizations on gender policy issues?

3 Always		**2** Often		**1** Seldom		**0** Never	

5A.3 How often do you discuss gender issues with your director concerning (possible) partner organizations?

3 Always		**2** Often		**1** Seldom		**0** Never	

Score:_____

B. Organizational aspects

5B.1 Does your work unit give orientation on including representative women-specific structures as contributors to activities?

3 Always		**2** Often		**1** Seldom		**0** Never	

5B.2 How often does the responsible director initiate discussions on choice of partner organizations and service delivery to them concerning gender equality?

3 Always		**2** Often		**1** Seldom		**0** Never	

Score:_____

PART FOUR : FEEDBACK AND REPORTING

Preparing the executive summary

A key step in the audit process is the preparation of the executive summary of the PGA report. While it may take some time to prepare the full report, a short summary focuses the gender audit facilitation team on the major points that need to be highlighted. This may also be prepared in bullet form. The Powerpoint presentation that is used for the debriefing session may also serve the purpose.

The executive summary is used in the debriefing with the work unit director and may also be distributed to the entire work unit during the feedback session.

In general, the facilitation team decides on the contents of the executive summary. However, the audited work unit staff members may suggest that some additional elements be included.

In order to create a balanced approach to the gender mainstreaming efforts undertaken by the work unit, point out key areas of good practice in gender mainstreaming as well as key areas for improvement.

A summary of recommendations also helps guide the director and the work unit towards positive future action.

Debriefing the work unit director

The findings of gender audits may sometimes be inconsistent with the impressions of unit directors concerning work accomplished on gender issues. Remember that staff members have not always had any rigorous training on gender issues. In addition, they may not necessarily have a common understanding of these issues. Therefore, some of the team's conclusions may come as a surprise to the director and the work unit, in which case the analyses will need explanation before the conclusions are readily accepted. It is important, therefore, that the facilitation team:

- Request a debriefing meeting with the unit director prior to the feedback session with the work unit;
- Go over the presentation with the director prior to the debriefing with all staff in order that he/she can become familiar with the overall results of the audit and the recommendations proposed by the facilitation team;
- Create a positive climate to ensure that the work unit director can identify with the recommendations.

Holding the feedback session for the work unit

The aim of the feedback session is to present the major findings and recommendations of the PGA to all members of the work unit with the director present. This session is scheduled at the end of the audit and should last about two hours.

- All members of the facilitation team participate in the feedback session;
- At the beginning of the session, the team thanks the work unit staff members and the director for volunteering to participate in the PGA;
- The findings are presented either in a PowerPoint presentation or on a flip chart to focus attention on the major points. The findings should include equal numbers of good practices implemented by the work unit in gender mainstreaming as well as areas for improvement.

Avoid terms such as "negative" or "shortcomings" and limit examples to three to five good practices and three to five areas for improvement per Key Areas of Analysis for optimum impact. These should be carefully chosen, taking into account their importance for the work unit, as well as the work unit's ability to act on the improvements. Words should be carefully chosen;

- The team should validate the areas in which the work unit is doing well and point to examples of good practices on which the unit can build;
- In highlighting areas for improvement, the facilitation team can identify and verify, through the participants' reactions, possible practical changes that could be made and how they could be achieved.
- A member of the audit facilitation team should explain the next steps relating to the submission of the PGA report to the work unit, as well as the unit's responsibility for follow-up.

How to complete an audit report for a work unit

A final report written by the facilitation team is the basis for subsequent action by the work unit. This report is the main output of the PGA; it includes the main findings of the assessment, highlights the good practices and proposes recommendations for performance improvement and concrete actions to follow up by the work unit. The findings need to be systematically presented under the five Key Areas of Analysis with recommendations that are rooted in the relevant findings.

Facilitators need to ensure that the audited unit takes ownership of the report. The facilitation team writes the report on the basis of the outcomes of the activities carried out during the audit process. The director and the staff of the work unit are responsible for giving effect to the recommendations contained in the report and for monitoring improvement in gender mainstreaming. The audit facilitation team should be open and willing to integrate any changes the audited unit considers necessary in order to better reflect the work of the unit without compromising the integrity of the PGA.

Practical Tips

Experience has shown that a PGA report that follows a certain presentation style and format is more readable and accessible and ultimately results in more effective action. PGA reports, therefore, are recommended to have the following features:

- Recommendations are derived from the consultative and reflective process. Generic recommendations are often not very helpful. Therefore, maximum efforts should be made to come up with specific, concrete, feasible, practical, and cost-effective recommendations. For example, if a recommendation is "to enhance capacity building thorough more intensive training", specific suggestions on "types and levels of training to be organized and by whom" should be clearly added. This helps to concretize the recommendation into doable actions. Recommendations that are outside the purview of action for the work unit should be avoided.
- Language used in the report should be simple and comprehensible to all staff. Where necessary, translations of PGA reports should be made available in the most prevalent languages of the work unit. Avoid gender-biased language.
- Annexes to the report should include relevant details such as the facilitation team's programme/calendar and agenda, list of interviews, list of documents reviewed, examples of outputs of exercises conducted and other interesting and relevant points from PGAs.
- As an optional item, lessons learnt from the assessment experience can also be included in the report, as guidance for subsequent PGA teams.
- Choosing a report format for the presentation of key findings, good practices and recommendations is left to the facilitation teams. Some teams opt for a standard reporting format which is written bearing in mind general findings, good practices and recommendations under each of the five Key Areas of Analysis. Other facilitators may choose to report the information in other formats, for example in three columns of key findings, good practices and recommendation.

Some guiding principles

Facilitation team members should emphasize throughout the audit process:

- The final report is the property of the work unit;
- The work unit can choose to share the report or the executive summary with other units, partner organizations and other groups that participated in the audit;
- The work unit can choose to make it accessible for wider distribution on the Internet/ Intranet.

The draft report should be completed and submitted in hard copy and electronically to the director and the gender focal point.

After their initial comments, the final report is submitted so that the report can be forwarded to all of the work unit staff members.

Drafting the report

Members of each audit facilitation team should decide how to share the task of drafting the report. Two approaches are outlined below:

- Some teams divide up the responsibility for drafting specific sections between the members. All sections of the draft are then collected and each member reads the text in its entirety and makes details comments and suggestions. After this first draft has been reworked, members read the entire text one last time for final editing and proofreading.
- Other teams may decide that each member should note down bullet points under every section of the report outline as the audit progresses. The bullet points are then revised and combined into a first draft by one team member. Because of the heavy workload that this implies, key coordinators should be less involved in other tasks, such as interviews or facilitating the feedback sessions.
- The report should be no more than 30-40 pages long.

A practical tip

Systematically updating notes from the desk review, interviews and workshops each day in a computer file helps to build up the information base for the report as the PGA progresses.

> **A question of tone: Being positive is constructive**
>
> Understandably, reports that are positive in tone are much more appreciated than those that are negative. This does not mean that the integrity of the feedback should be compromised, only that the same message can be presented from the perspective of solutions. For example, on the one hand, projects containing good practices can be named in the report. On the other hand, instead of describing in detail how another project is deficient in gender mainstreaming, it is more helpful to identify "entry points" for integrating gender which may ultimately motivate project coordinators towards positive action (see Part Five: Annexes for a model gender audit report).

How to formulate recommendations:[9]

To ensure quality in the report, recommendations should:

- Be numbered, and limited;
- Be formulated in a clear and concise manner;
- Be relevant and useful;
- Be supported by evidence and follow logically from findings;
- Not be too general but specific to the programme evaluated;
- Specify who is called upon to act;
- Specify which action is needed to remedy the situation that needs improvement;
- Distinguish the priority of importance of single recommendations (high, low, medium);
- Specify the recommended time frame for follow-up;
- Acknowledge whether there are resource implications.

Action planning

Tha aim of this session is to take adventage of the momentum gained by a discussion of the audit findings and recommendations to ensure that the work unit takes action

After the major audit findings and recommendations have been shared with the work unit and the facilitation team has identified and verified areas for possible future action, the facilitation team can assist in the following ways:

- Action planning should be a main follow-up to the PGA process. There are two equally effective ways to undertake the action plan formulation process;
- Taking advantage of the momentum gained by the discussion of the audit team's findings and recommendations during the feedback session, the unit could request from the gender coordinating structure (or members of the audit facilitation team, if available) a short session on action planning with unit staff. It should be made clear that this would only be the beginning of the formulation of a more complete action plan;
- This could lead to the formation of a gender focal team or a task force (of not more than four members) to follow up on the audit's recommendations;

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[9]   Adapted from ILO: ILO Policy Guidelines for Results-Based Evaluation, Geneva 2011.

4. FEEDBACK AND REPORTING

- The PGA process could be completed in two phases: an initial stage carrying out the assessment and submitting the draft report's findings and recommendations; and including a "reflection time" to allow the the work unit to discuss them; and set a second stage at a later date which would be devoted to a half or full day action-planning session. This could help identify three or four important areas to improve within the next twelve months. It should focus on visible, practical and achievable changes;

- Discussions among the work unit participants the WHO, HOW, WHEN and WHAT of the types of assistance that would be needed to instigate change in the areas are identified;

- The role of the audit facilitation team is to facilitate the action planning process but it is the work unit's staff members who prepare the Action Plan. Working on the basis of the possible action areas outlined in the recommendations, the audit team can help the work unit to prioritize a few actions for immediate implementation or "quick wins". Alternatively it can help chart an entire action plan for the forthcoming year by:

  – Identifying three or four important areas to improve within the next twelve months. For this, the work unit should focus on visible, practical and achievable changes.

  – Inviting the work unit to form a gender focal team or task force of not more than four members, to monitor the implementation of the Action Plan. Alternatively entrust this task to the already existing gender focal team within the work unit. The responsibility of implementing the Action Plan lies primarily with the Director and all staff in the work unit while the role of the gender focal team is to monitor, oversee and assist in the implementation.

  – Initiating a discussion on the WHO? WHAT? WHEN? and HOW? These activities are to be fully implemented, working out the details possible.

  – Listing what types of assistance may be necessary to commence the activities and instigate changes in the areas identified.

Five Key Areas of analysis	Priority Actions	Planned Activities WHAT/HOW	WHO	WHEN	ASSISTANCE NEEDED
I Natl and intl context and linkages, expertise & competence	1. 2. 3.				
II Gender mainstreaming in programming and implementation, monitoring & evaluation and choice of partners					
III Information and Knowledge management					
IV Decision making Staffing & org. culture					
V Perception of achievement of change					

PART FIVE: ANNEXES

Annex 1

A brief history of ILO participatory gender audits

1. Since the 1999 ILO policy on equality between women and men,[10] the Organization has undergone a significant transformation regarding gender mainstreaming. The commitment to assist constituents and ILO officials to address the gender dimensions of their work is well under way. Central to this effort is the Participatory Gender Audit (PGA) – a unique tool for evaluating and monitoring the achievement of gender equality in the Organization and the world of work. The 2009 ILC Conclusions on Gender Equality instructed ILO to use the PGA as a tool for assessing progress towards gender equality and stated that progress on the Conclusions should be reported to the Governing Body.[11]

2. In 2005, the ILO Governing Body made gender mainstreaming obligatory in all technical cooperation activities and recognized the PGA as a key tool.[12] This was reinforced in the 2006 ILC Conclusions on Technical Cooperation, which state that the ILO should "actively promote mainstreaming of gender equality in donor partnership agreements".[13]

3. The International Training Centre of the ILO (ITC–ILO) has conducted since 2007 a standard course on "Training for gender audit facilitators" (offered in English, French and Spanish).

Extending the PGA to ILO constituents and UN agencies

4. In the first series of gender audits (2001-2002), the focus was on auditing ILO units and offices in order to increase gender awareness and build capacity among staff, especially in planning and delivering ILO projects and programmes. These audits of course continue.

5. In the second series (2003-05), the PGA was extended into a widely used national-level tool among ILO constituents in Decent Work Country Programmes (DWCPs). It was also adopted by United Nations Country Teams (UNCTs) and UN agencies at country level to assist in designing UNDAFs. During this period the methodology was modified, and a two-stage process developed, beginning with a training of volunteer gender audit facilitators (TOFs) from entities requesting audits, and in the second stage using this capacity on gender mainstreaming in the PGA itself. This method proved effective and has since been used in several countries. The added value of ILO-run TOFs has been the multiplier effect of creating specific capacity and skills among constituents, national gender experts and UN staff.

6. In 2008, the UN Inter-Agency Network on Women and Gender Equality (IANWGE) proposed that the PGA be adopted by the UN system as a valuable intervention for a holistic assessment of performance on gender equality. The PGA was perceived as a strategic complement to the roll-out of the UNCT Performance Indicators for Gender Equality (known as the Scorecard). [14] The two mechanisms – PGAs and Scorecard – have sometimes been used in tandem, with the Scorecard providing a quantitative rating (from 0 to 5) for the entity, and the PGA permitting

[10] Gender equality and mainstreaming in the International Labour Office, Director-General's Announcements, Circular No. 564, 17.12.1999.

[11] 2009 ILC Resolution concerning gender equality at the heart of decent work, paras. 52 (f) and 58.

[12] GB.292/TC/1: para. 50(a), and para. 46 which states " [...] the participatory gender audits of ILO programmes, field offices and constituent organizations have been important means to assist staff, constituents and partners to understand the 'why' and 'how to' of gender mainstreaming in technical cooperation."

[13] ILO: *The role of ILO in technical cooperation*, Report of the Committee on Technical Cooperation, 95th Session, Geneva, 2006 (para. 22 of the Conclusions).

[14] UN Inter-Agency Network on Women and Gender Equality, Report of the Seventh Session (New York, February 2008), IANGWE/2008/REPORT, paras. 22-25.

a more detailed qualitative assessment. The IANWGE proposal led to further training of UN staff on the PGA methodology and subsequent conducting of gender audits by several UNCTs, in particular a number of "Delivering as One" pilots, as well as by individual UN agencies or joint programmes or theme groups.

A further development has been the landmark System-wide Action Plan (UN-SWAP) on gender equality and women's empowerment, which was adopted in 2012 of the United Nations Chief Executives Board for Coordination. The UN-SWAP is to be applied throughout the UN system, and for the first time, it will have a set of common measures with which to measure progress in its gender-related work, including the mainstreaming of the gender perspective across all its operations. In the UN SWAP Framework, under the policy area of "Oversight", the ILO PGA is specifically mentioned as a tool for gender responsive auditing.

Glossary of key gender concepts

This glossary provides both general and ILO-specific definitions and additional information on a limited number of key gender concepts that are directly relevant to gender audits. It is arranged in alphabetical order and gives cross-references wherever appropriate.

Affirmative (positive) action

Affirmative action to counter sex discrimination comprises special - mostly temporary - measures to redress the effects of past or continuing discrimination in order to establish de facto equality of opportunity and treatment between men and women. Such measures are targeted at a particular group and are intended to eliminate and prevent discrimination and to offset disadvantages arising from existing attitudes, behaviour and structures based on stereotypes concerning the division of social roles between men and women.

The adoption of positive measures stems from the observation that the legal banning of discrimination has not proved sufficient in itself to create equity in the world of work.

Affirmative action in favour of women should not be considered as discriminatory against men in a transitional period.

Affirmative action for women may encompass a wide range of measures, including corrective action such as:

- setting targets, goals or quotas for women's participation in activities or sectors, or at levels from which they have previously been excluded and in which they are still under-represented;
- promoting women's access to wider opportunities in education, vocational training and employment in non-traditional sectors and at higher levels of responsibility;
- placement, guidance and counseling services; adapting working conditions and adjusting work organization to suit the needs of workers with family responsibilities; or fostering greater sharing of occupational, family and social responsibilities between men and women.

Atypical work

Atypical work (also known as non-standard work) covers a large and growing variety of forms of work and employment characterized by flexibility and reduced security. They include part-time work, casual and seasonal work, job sharing, fixed-term contracts, temporary agency work, home-based work, remote working; self-employment, and the work of unpaid spouses or family members in small family-run enterprises. These forms of work differ from the norm historically regarded as "typical" or standard, namely full-time, socially secure employment of unlimited duration, with a single employer, performed at the employer's workplace and with a guaranteed regular income. In fact, the proliferation of atypical work is such that it is becoming less and less possible to describe permanent, full-time jobs as the norm.

Much atypical work is informal and poorly, or not at all, covered by social security systems. However, the regulation of atypical work confronts a double challenge: the lack of regulation per se and the inability of traditional labour laws to extend effectively to atypical work.

Women's massive incorporation into atypical work in the globalized economy has both positive and negative aspects. On the one hand, it has improved the social and economic status of a great many women through waged employment and has made it easier for them to combine work outside the home with housework and family responsibilities. On the other hand, the kinds of work available are often low-status, low-paid and with poor working conditions; the lack of regulation of atypical work militates against job security and social protection.

Basic/practical gender needs

Basic/practical gender needs are those which arise from the actual conditions which women and men experience due to the gender roles assigned to them in society. They are often related to women as mothers, homemakers and providers of basic needs, and are concerned with inadequacies in living and working conditions, such as food, water, shelter, income, health care and employment.

For women and men in the lower socio-economic strata, these needs are often linked to survival strategies. Addressing them alone only perpetuates the factors that keep women in a disadvantaged position in their societies.

Practical needs rise out of the gender division of labour and women's subordinate position in society. They do not challenge the existing power relations between women and men. They are merely a response to an immediate perceived necessity, identified within a specific context.

Care work

Care work may be very broadly defined as the work of looking after the physical, psychological, emotional and developmental needs of one or more other people. Care recipients are generally identified as infants, school-age children, people who are ill, persons with a disability, and elderly people. Care providers typically include public and private health services, state-regulated or public-sector social workers, public or private care-provider agencies, enterprises of employment, voluntary and community organizations, faith-based organizations or networks, and relatives and friends. It is done visibly, as formal employment in institutions, and invisibly and informally, in the home (one's own or someone else's). It is sometimes remunerated and sometimes not. It varies widely in intensity and effort. All this makes it hard for politicians and statisticians to arrive at a clear and workable definition of care work.

It is now generally recognized that care work is real work, whatever the setting in which it is performed. However, this recognition is only very recent and was brought about under opposing pressures from orthodox economists and politicians seeking to reduce care's financial burden on the state on the one hand, and from feminists seeking to make care visible and countable on the other.

Women continue to be mainly responsible for the "care economy" as an extension, or an integral part, of domestic labour. Care work has low status and attracts low pay if performed as employment and none at all when performed as housework

Care work will inevitably become more important because of changes in demographic patterns and in the nature of the family, changes in the social and economic status of women, and changes in welfare states.

Childcare and family services and facilities

Childcare and family care are broadly-based concepts covering the provision of public, private, individual or collective services to meet the needs of parents and children or members of the immediate family.

Making facilities available to enable workers to discharge their responsibilities in all areas of their lives is an important aspect of the promotion of equality of treatment between male and female workers with family responsibilities, and between such workers and other workers. All workers, irrespective of their sex, should have the possibility of combining paid employment with their responsibilities for children and other family members. Sufficient and adequate childcare and family services and facilities, including facilities for breastfeeding mothers, should be provided so that workers with family responsibilities can exercise their right to free choice of employment. These services and facilities should be flexible enough to meet the particular needs of children of different ages and of other family members requiring care.

The improvement of working and living conditions for workers with family responsibilities should be pursued by means of adequate social policies, including measures to be taken by the public authorities. The needs of workers who work unconventional hours and whose children cannot be accommodated in facilities keeping traditional hours should be taken into account.

As employers become more aware of their employees' needs in this respect, many employers, particularly in the developed countries, are voluntarily taking various kinds of action towards the provision of childcare services and facilities for their employees, including on-site or off-site childcare centres, private home day-care agencies, childcare subsidies paid to employees, and information referral services.

Collective bargaining and gender issues

Collective bargaining can be an important way to promote gender equality. In most countries it is a principal means of determining terms and conditions of employment, including all aspects of gender equality at work. Equal pay, overtime, hours of work, leave, maternity and family responsibilities, health and the working environment, and dignity at the workplace are all issues for collective bargaining with the potential for promoting gender equality in the workplace. Women's access to career development, promotion and vocational training are also important issues that can be considered in collective bargaining. Not only do gender issues need to be addressed in collective bargaining, but traditional collective bargaining issues, referring to the terms and conditions of employment such as wages, hours of work, working conditions and grievance procedures should be reassessed from a gender perspective.

The subjects for negotiation depend on the social, economic and legal context, and on what women themselves choose as priorities. They might include (inter alia) affirmative action, flexible working hours, pay equity, childcare provision, or sexual harassment. However, gender issues are often not sufficiently dealt with in collective bargaining because women are under-represented in trade union decision-making structures and negotiating teams.

Men also need certain types of protection with regard to their role in social reproduction. Measures are also necessary to give both men and women the opportunity to share more family responsibilities (e.g. parental leave, flexible working hours and greater access to part-time work).

Declaration on Fundamental Principles and Rights at Work

The fundamental principles and rights of employers and workers are derived from the ILO Constitution and the Declaration of Philadelphia. These principles and rights concern:

• freedom of association and effective recognition of the right to collective bargaining;
• the elimination of forced or compulsory labour;
• the abolition of child labour;
• the elimination of discrimination with respect to employment and occupation.

The fundamental principles and rights are laid down in eight fundamental Conventions (which means that the member States that ratify them thereby commit themselves to putting their provisions into effect in both law and practice):

• freedom of association and the right to collective bargaining:
• Freedom of Association and Protection of the Right to Organise Convention, 1948 (No. 87) and Right to Organise and Collective Bargaining Convention, 1949 (No. 98).
• elimination of forced or compulsory labour: Forced Labour Convention, 1930 (No. 29) and Abolition of Forced Labour Convention, 1957 (No. 105).
• abolition of child labour: Minimum Age Convention, 1973 (No. 138) and Worst Forms of Child Labour Convention, 1999 (No. 182).

- elimination of discrimination in respect of employment and occupation: Equal Remuneration Convention, 1951 (No. 100) and Discrimination (Employment and Occupation) Convention, 1958 (No. 111).

In 1998, the Declaration on Fundamental Principles and Rights at Work and its Follow-up was adopted by the International Labour Conference. The Declaration is a promotional instrument, intended to reaffirm the commitment of all ILO member States to the fundamental principles and rights to which all countries must adhere by the very fact of their membership of the Organization, even if they have not yet been able to ratify the corresponding Conventions.

Diversity in the workplace

Diversity is broadly defined as "the range of values, attitudes, cultural perspectives, beliefs, ethnic background, sexual orientation, skills, knowledge and life experiences of the individuals making up any given group of people" (European Commission, 1998). However, this general definition crucially assumes that any group is made up of both males and females and omits gender differences. Diversity in the workplace refers to the differences between workers, such as sex/gender, race/ethnicity, age, physical and mental ability, socio-economic class, language, religion, nationality, education, sexual orientation, family/marital status, HIV status, and so on. These differences may be visible or invisible, and they influence each person's values, beliefs, attitudes, behaviour and life. A diversity approach to the workforce is founded on the premise that harnessing these differences will create a productive environment in which everyone feels that they are valued and their talents and skills are being used optimally, and that this contributes to meeting the organization's goals. A workforce that represents the diversity of a society in terms of gender and other attributes is more likely to understand and respond more effectively to the needs of its customer or client base in that society. Moreover, building and maintaining a diverse workforce with more than token representation of under-represented groups and equitable treatment of all can in itself embody the principles of equality and non-discrimination, helping to defuse prejudices and stereotypes and showing that a society free of discrimination is possible, effective and desirable.

Elder care

As life expectancy rises and the world's population ages, more and more workers in all regions are caring for elderly or disabled parents or relatives. Governments have come to realize that the growing number of elderly people requiring care represents a potentially huge financial burden on the State. The management of elder care and its division between the public and private spheres is the subject of an evolving debate.

In some industrialized countries, a variety of programmes have been established to assist working family members who are caring for elderly relatives. In other countries programmes are geared more to the elderly themselves than to workers' needs for assistance with elder care, but the existence of such programmes can perhaps be considered a starting point for programmes directed more towards the needs of working carers.

Equal opportunity

Equal opportunity means equal access to all economic, political and social participation and facing no barriers on the grounds of sex.

Equal opportunity in the world of work means having an equal chance to apply for a particular job, to be employed, to own or run an enterprise, to attend educational or training courses, to be eligible to attain certain qualifications, and to be considered as a worker or for a promotion in all occupations or positions, including those dominated by one sex or the other.

Equal treatment in the world of work refers to equal entitlements such as in pay, working conditions, employment security and social security.

Equal remuneration

The principle of equal pay for work of equal value (as defined in ILO Convention No. 100 on Equal Remuneration) means that rates and types of remuneration should be based not on an employee's sex but on an objective evaluation of the work performed.

There are several major reasons for these differences in earnings. Jobs done by the majority of women are classified at lower levels. Differences arise in skills and qualifications, seniority, and sectors of employment. Women are highly concentrated in "flexible" work such as part-time, piece-rate or temporary work, which are poorly paid. Women work fewer overtime hours than men. Finally, discrimination with respect to pay, access to and promotion in employment is presumed to be an important factor in the gender pay gap.

The principle of equal pay for work of equal value can be implemented by some practical measures:

- Job classification systems and pay structures should be based on objective criteria, irrespective of the sex of the people who perform the job;
- Any reference to a particular sex should be eliminated in all remuneration criteria, and in collective agreements, pay and bonus systems, salary schedules, benefit schemes, medical coverage and other fringe benefits;
- Any remuneration system/structure that has the effect of grouping members of a particular sex in a specific job classification and salary level should be reviewed and adjusted to ensure that other workers are not performing work of equal value in a different job classification and salary level.

Feminism

Feminism is a body of theory and social movement that questions gender inequality and seek to redress them at the personal, relational and societal levels.

Gender

Gender refers to the socially constructed differences and relations between males and females. These vary widely among societies and cultures and change over time. The term "gender" is not interchangeable with the term "sex", which refers exclusively to the biological differences between men and women, which are universal. Statistical data are disaggregated according to sex, whereas gender characterizes the differing roles, responsibilities, constraints, opportunities and needs of females and males in all areas and in any given social context.

Gender roles are learned behaviours in a given society, community or other social group. They condition which activities, tasks and responsibilities are perceived as appropriate to males and females respectively. Gender roles are affected by age, socio-economic class, race/ethnicity, religion, and the geographical, economic, political and cultural environment. Gender relations are also relations of power which affect who can access and control tangible and intangible resources.

Changes in gender roles often occur in response to changing economic, natural or political circumstances including development efforts or structural adjustment, or other nationally or internationally based forces. The gender roles within a given social context may be flexible or rigid, similar or different, and complementary or conflicting. Both women and men are involved to differing degrees and in different ways in reproductive, productive and community management activities and play roles within social and political groups. Their involvement in each activity reflects the gender division of labour in a particular place at a particular time. The gender division of labour must be reflected in gender analysis.

Gender relations have an effect on every aspect of employment, working conditions social protection, representation and voice at work; this is why gender is called a cross-cutting issue in the world of work. The disparity in any area between women and men in terms of their levels

of participation, access to resources, rights, power and influence, remuneration or benefits is often called the gender gap. Of particular relevance to gender equality at work is the gender pay gap, the disparity between the average earnings of men and women; but gender gaps are also evident in access to employment, education and vocational training, and meaningful participation in representative social dialogue institutions.

Gender analysis and planning

Gender analysis is a tool to diagnose the differences between women and men regarding their specific activities, conditions, needs, access to and control over resources, and their access to development benefits and decision-making. It studies the links between these and other factors in the larger social, economic, political and environmental context.

Gender analysis is the first step in gender-sensitive strategic and development planning. It entails:

- collecting sex-disaggregated data and gender-sensitive information about the population being addressed;
- identifying the sexual division of labour, and access to and control over resources and benefits by men and women respectively;
- understanding girls', boys', women's and men's needs, constraints and opportunities;
- identifying constraints and opportunities in the larger context;
- reviewing the capacities of the relevant organizations to promote gender equality.

Gender analysis springs from the concept of "gender and development" (GAD), which itself emerged in the 1980s as a response to criticisms of the **"women in development" (WID)** approach, began in the early 1970s as researchers started to analyse the sexual division of labour and the specific impact of development on women. The WID approach advocated integrating women into ongoing development strategies, focusing on the disadvantaged position of women and the elimination of discrimination against them. The GAD approach, by contrast, focuses not solely on women but on the social differences and unequal relations between men and women. It emphasizes the contribution of both women and men to shaping gender-equitable development.

Women's empowerment is a concept often used in gender analysis and planning. It generally refers to the idea that the redistribution of unequal power relations between men and women can be advanced by women increasing their self-reliance and internal strength through a process of awareness and capacity building leading to greater participation, greater decision-making power and control, and ultimately to transformative action. Women's economic empowerment means transcending the low-paid and part-time work which often merely serve to reinforce existing gender inequalities. More broadly, meaningful participation in formal decision-making structures (such as governments, employers' organizations and trade unions) is seen as a key aspect of women's empowerment (OECD, 1998). A "**masculinities**" focus is also a useful way of looking at changing gender relations by looking at the roles of men and boys. Among other things, it can help increase awareness and acceptance of caring roles for men.

Gender planning may be broadly defined as planning that integrates gender equality and women's empowerment considerations at all stages into the design, implementation, monitoring and evaluation of a programme or project, including the setting of goals and objectives, the definition of strategies and indicators, the selection of methodologies and tools for integrating a gender perspective, gender-related activities and the allocation of resources to carry them out.

Several gender planning approaches and frameworks have been developed, of which the Harvard and Moser frameworks are among the most widely used.

Gender and organizational change

Refers to the fact that organizations are some of the main perpetrators of unequal gender relations.

If gender relations in society are to change, organizations should promote gender-sensitive policies and programmes, and ensure gender balance in their structures.

Gender aware/ sensitive policies

Recognize that within a society, actors are women and men, that they are constrained in different and often unequal ways, and that they may consequently have differing and sometimes conflicting needs, interests and priorities.

Gender-blind

Research, analysis, policies, advocacy materials, project and programme design and implementation that do not explicitly recognize existing gender differences that concern both productive and reproductive roles of men and women. Gender-blind policies do not distinguish between the sexes. Assumptions incorporate biases in favour of existing gender relations and so tend to exclude women.

Gender Budgeting

Gender budgeting is the application of gender mainstreaming in the budgetary process. It means incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality.

Gender budgeting examines how budgetary allocations affect the social and economic opportunities of men and women. Reallocations in revenue and expenditure and restructuring of the budgetary process may be necessary in order to promote gender equality.

Gender division of labour

The division of labour between women and men depends on the socio-economic and cultural context, and can be analyzed by differentiating between productive and reproductive tasks as well as community-based activities: who does what, when, how, for how long, etc.

Women's activities are often unpaid or take place in the informal sector not covered by labour legislation. As a result, women's work is also often excluded from national employment and income statistics. These tasks need to be revisited from a gender perspective, so that productive and reproductive functions in the home, the community or at the workplace can be shared fairly between women and men as far as possible.

Gender equality

Gender equality refers to the enjoyment of equal rights, opportunities and treatment by men and women and by boys and girls in all spheres of life. It asserts that people's rights, responsibilities, social status and access to resources do not depend on whether they are born male or female. It does not mean, however, that men and women are the same or must become the same, or that all labour market measures must arrive at the same results. Gender equality implies that all men and women are free to develop their personal abilities and make life choices without the limitations set by stereotypes or prejudices about gender roles or the characteristics of men and women.

In the context of decent work, gender equality embraces equality of opportunity and treatment, equality of remuneration and access to safe and healthy working environments, equality in association and collective bargaining, equality in obtaining meaningful career development,

maternity protection, and a balance between work and home life that is fair to both men and women. The ILO understands gender equality as a matter of human rights, social justice and sustainable development.

Gender equality in the world of work

Gender equality in the world of work, within the ILO Decent Work Agenda, refers to:

- Equality of opportunity and treatment in employment;
- Equality in association and collective bargaining;
- Equality in obtaining a meaningful career development;
- A balance between work and home life that is fair to both men and women;
- Equal participation in decision-making, including in the constitutive ILO organs;
- Equal remuneration for work of equal value;
- Equal access to safe and healthy working environments and to social security.

Gender equity

Gender equity means fairness of treatment for women and men, according to their respective needs and interests. This may include equal treatment or treatment that is different but considered equivalent in terms of rights, benefits, obligations and opportunities.

Equitable access to education, irrespective of whether the child is a boy or a girl, would be an example. In some developing countries, although primary education is compulsory and free, girls are not sent to school because in certain hours of the day they have household responsibilities. Therefore, flexibility of hours in school would ensure fairness of treatment.

Gender Gap

The gender gap is the difference in any area between women and men in terms of their levels of participation, access to resources, rights, power and influence, remuneration and benefits. Of particular relevance related to women's work is the "gender pay gap", describing the difference between the average earnings of men and women.

Gender mainstreaming

Although the concept of gender mainstreaming had been in existence for some years, the adoption of gender mainstreaming as the main global strategy for promoting gender equality was clearly established in 1995 at the Fourth World Conference on Women in Beijing. Gender mainstreaming is defined as:

> *the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes in any area and at all levels. It is a strategy for making women's as well as men's concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality.* **(ECOSOC, 1997).**

Gender mainstreaming is not a goal in itself, but a means to achieve gender equality. Gender mainstreaming and special interventions to promote equality between women and men are complementary strategies. Special interventions to promote gender equality can target either women alone, both women and men, or men alone. There is no conflict between the two strategies; on the contrary, targeted interventions are seen as essential for mainstreaming.

Using a mainstreaming strategy based on gender analysis implies, in particular:

- awareness-raising and capacity-building activities;
- at the planning, taking into account implementation, monitoring and evaluation stages, the effects of policies and programmes on women and men;
- adequate allocation of human and financial resources;
- active participation of both women and men in decision-making in all areas and at all levels;
- adequate monitoring tools and mechanisms to enable ongoing assessment of how and to what extent gender is being effectively mainstreamed.

Gender-neutral policies

Gender-neutral policies use the knowledge of gender differences in a given context to overcome biases in delivery, to ensure that they target and benefit both genders effectively in terms of their practical gender needs. Moreover, they work within the existing gender division of resources and responsibilities

Policies that appear gender-neutral may on closer investigation turn out to affect women and men differently. Why? Because we find substantial differences in the lives of women and men in most policy fields; differences which may cause apparently neutral policies to impact differently on women and men and reinforce existing inequalities. Policies that are directed at, or have clear implications for, target groups/population groups are, consequently, to a larger or lesser degree gender relevant.

Sometimes efforts to be gender-sensitive employ the use of gender-neutral language in order to counteract sexist terminology, as for example masculine terms for professions and trades or the constant use of masculine pronouns. However, if care is not taken, sexist language may be eliminated, but gender variables will remain masked, making it more difficult to address underlying gender inequalities.

Gender roles

Gender roles are learned behaviour in a given society, community or social group in which people are conditioned to perceive activities, tasks and responsibilities as male or female. These perceptions are affected by age, class, caste, race, ethnicity, culture, religion or other ideologies, and by the geographical, economical and political environment.

Productive role refers to income generating work undertaken by either men or women to produce goods and services, as well as the processing of primary products that generates an income.

Reproductive role refers to childbearing and the different activities carried out in what is called today the "care economy"; namely, the many hours spent caring for the household members and the community, for fuel and water collection, food preparation, child care, education and health care, and care for the elderly, which for the most part remain unpaid.

Analysis of the gender division of labour has revealed that women typically take three types of roles in terms of the paid and unpaid labour they undertake **(women's triple role)**. These roles can be described as: the productive role (refers to market production and home/subsistence production undertaken by women which generates an income); the reproductive role (refers to "care economy" activities); and the community management role (refers to activities undertaken by women to ensure the provision of resources at the community level, as an extension of their reproductive role).

Changes in gender roles often occur in response to changing economic, natural or political circumstances, including development efforts, structural adjustment, or other nationally- or internationally-based forces.

The gender roles of men and women within a given social context may be flexible or rigid, similar or different, and complementary or conflicting. Both women and men play multiple roles – productive, reproductive and community management¾in society.

Usually perceived as breadwinners, men are able to devote more time to a single productive role, and play their multiple roles one at a time. In contrast to men, women are often seen as secondary wage earners. They must play their roles simultaneously and balance competing claims on their limited time. Women's work time and flexibility are therefore much more constrained than has been the case for men. Since men and women have historically played different roles in society, they often face very different cultural, institutional, physical and economic constraints, many of which are rooted in systematic biases and discrimination.

Gender-sensitive indicators

Are designed to measure benefits to women and men and capture quantitative and qualitative aspects of change.

Gender-sensitive indicators are indicators disaggregated by sex, age and socio-economic background. They are designed to demonstrate changes in relations between women and men in a given society over a period of time. The indicators comprise a tool to assess the progress of a particular development intervention towards achieving gender equality. Sex-disaggregated data demonstrates whether both rural women and men are included in the programme or project as agents/project staff, and as beneficiaries at all levels. The approach allows for effective monitoring and evaluation.

Quantitative gender-sensitive indicators refer to the numbers and percentages of women and men involved in or affected by any particular activity. They draw on the sex-disaggregated data systems and records. They measure impact or effectiveness of activities in addressing practical gender needs, increasing gender equality of opportunity, influence or benefit and in developing gender- sensitive organizational culture.

Qualitative gender-sensitive indicators seek to measure quality of perceptions and experiences through specific techniques and participatory methods such as focus group discussions and case studies.

Examples of gender-sensitive indicators are:

Quantitative:

- Participation of all stakeholders in project identification and design meetings (attendance and level of participation/contribution by sex, age, and socio-economic background);
- Degree of rural women and men's inputs into project activities, in terms of labour, tools, money, etc.;
- Benefits (e.g., increased employment, crop yields, etc.) going to women and men, by socio-economic background and age.

Qualitative:

- Level of participation as perceived by stakeholders through the different stages of the project cycle (by sex, age, and socio-economic background);
- Degree of participation of an adequate number of women in important decision-making (adequacy to be mutually agreed by all stakeholders) – to be measured through stakeholder responses and by qualitative analysis of the impact of different decisions.

Gender-specific policies

These use the knowledge of gender differences in a given context to respond to the practical gender needs of a specific gender working with the existing division of resources and responsibilities.

Glass ceiling

Invisible and artificial barriers that militate against women's access to top decision-making and managerial positions, arising chiefly from a persistent masculine bias in organizational culture, are popularly known as the "glass ceiling". Although a few women have made it to the very top in the world of work, this phenomenon is still very prevalent in all but a handful of countries despite women's increased levels of qualifications, employability and work performance.

The existence of the glass ceiling is a prime example of discrimination against women at work through vertical segregation by sex. It exists because women's career paths tend to be more circuitous and interrupted than those of men which are typically linear. Women workers still bear more of the main burden of family responsibilities than men and so have less time for the "extracurricular" formal and informal networking essential for advancement in enterprises.

Clearly, eliminating sex discrimination by law will naturally weaken the glass ceiling.

The metaphor of the glass ceiling has been extended to apply to other areas of vertical and horizontal occupational segregation, such as "glass walls" (concentration of women in certain sectors, women unable to jump the gap between secretarial/administrative and managerial functions regardless of their educational attainments or experience) and the "sticky floor" (women trapped in the lowest-paid jobs or on the bottom rungs of their occupation and unable to rise above the poverty line).

Harassment and pressure

Harassment and pressure (also known as bullying or mobbing) at the workplace can occur as various offensive behaviours. It is characterized by persistently negative attacks of a physical or psychological nature, which are typically unpredictable, irrational and unfair, on an individual or group of employees. Sexual harassment is a particular form of harassment. Electronic surveillance of workers also has the potential to constitute harassment in some circumstances.

No worker, female or male, should be subjected to harassment or pressure in any term or condition of employment, or to any emotional abuse, persecution or victimization at work. In particular, there should be no sexual harassment. Work assignments should be distributed equally and based on objective criteria. The job performances of all employees should be evaluated objectively.

Employees should not encounter obstacles in the performance of their job functions and should not be required to perform additional work duties or assignments on the basis of their sex. Victims of harassment and pressure should be protected from retaliatory or disciplinary action by adequate preventive measures and means of redress.

There is growing awareness that harassment and pressure at the workplace is not merely an individual human problem but is rooted in the wider social, economic, organizational and cultural context, which includes pervasive inequalities in gender relations. As research indicates, the effects of harassment are also a costly burden for the worker, the enterprise and the community. Harassment should therefore be addressed by adequate measures.

Masculinities

The term "masculinities" refers to patterns of conduct linked to men's place in a given set of gender roles and relations. The plural is used because patterns of masculinity vary over time, place and culture. Research based on a gender analysis of men and masculinities which recognizes that unequal gender power relations can also oppress men and boys is a growing field of study to which the ILO has made some specific contributions, notably as regards HIV/AIDS.

Maternity protection

Maternity protection for employed women is an essential element in equality of opportunity. It seeks to enable women to combine their reproductive and productive roles successfully, and to prevent unequal treatment in employment due to women's reproductive role.

The elements of maternity protection covered by the most recent standards concerned with maternity protection, Convention No. 183 and Recommendation No. 191 (2000), are:

- maternity leave – the mother's right to a period of rest in relation to childbirth;
- cash and medical benefits – the right to cash benefits during absence for maternity;
- protection of the health of mother and child during pregnancy, childbirth and breastfeeding;
- the mother's right to breastfeed a child after her return to work;
- employment protection and non-discrimination – guaranteeing the woman employment security and the right to return to the same job or an equivalent one with the same pay.

Historically, maternity protection has always been a central concern of the ILO.

Occupational segregation

Occupational segregation by sex occurs when women and men are concentrated in different types and at different levels of activity and employment. Worldwide, labour markets are segregated to a surprisingly large extent: some 60% of non-agricultural workers in the world are in an occupation where at least 80% of the workers are either women or men. Women tend to be confined to a different range of occupations than men are (horizontal segregation) and to lower job grades (vertical segregation). In the 1980s and 1990s, the range of occupations in which women were employed expanded in many countries –especially some OECD countries and some small developing countries where occupational segregation was high – but narrowed in others, particularly in transitional economies. In some countries, legislation sets limitations on the kind of work women can do, and this has generally been based on the idea that women's reproductive function must not be put at risk – an idea that is by now on the whole outdated with a few exceptions.

The causes of occupational segregation are usually to be found in practices based on entrenched stereotypes and prejudices concerning the roles of women and men in society, including indirect discrimination in education systems. Occupational segregation is an expression of inequality, as it implies differentials in power, skills, income and opportunities.

Even though women are now fast entering the technical occupations and ICT work in greater numbers in some regions of the world, they are still present in fewer occupations than men, and are under-represented at senior management level almost everywhere. They are in the majority in agriculture and services. Women predominate at lower levels in education, health and social services –all occupations related to caring – whereas men predominate in occupations assumed to require physical strength, such as construction and mining, or physical or psychological aggressiveness, such as high finance, politics or the military.

Sex

Sex refers to the biological differences between men and women that are universal and usually determined at birth. For example, only women can give birth; only men can determine the sex of their child.

Sex as a noun has been defined as a biological category, in contrast to the social category of gender. Sex refers to the physical characteristics of the body, while gender concerns socially learned forms of behaviour. Sex and gender division are not the same.

Sex-disaggregated data

Collection and use of quantitative and qualitative data by sex (i.e., not gender) is critical as a basis for gender-sensitive research, analysis, strategic planning, implementation, monitoring and evaluation of programmes and projects.

The use of these data reveals and clarifies gender-related issues in areas such as access to and control over resources, division of labour, violence, mobility and decision-making.

Sex discrimination

Differential treatment of men and women – in employment, education and access to resources and benefits, etc. – on the basis of their sex. Discrimination may be direct or indirect.

Direct sex discrimination exists when unequal treatment between women and men stems directly from laws, rules or practices making an explicit difference between women and men (e.g., laws which do not allow women to sign contracts).

Indirect discrimination is when rules and practices that appear gender neutral in practice lead to disadvantages primarily suffered by persons of one sex. Requirements which are irrelevant for a job and which typically only men can meet, such as certain height and weight levels, constitute indirect discrimination. The intention to discriminate is not required.

Discrimination is defined in ILO Convention 111 (1958) as any distinction, exclusion or preference based on race, colour, sex, religion, political opinion, national extraction or social origins which nullifies or impairs equality of opportunities or treatment in employment or occupation. In most countries, the law prohibits discrimination based on sex. In practice, however, women in both developing and industrialized countries continue to encounter discrimination in one form or another in their working lives.

While cases of direct and *de jure* sex discrimination have declined, indirect and *de facto* discrimination continue to exist or have emerged. To identify discrimination based on sex, it is advisable to look not only at an intent or purpose reflected in rules or action, but also at the actual effect generated.

Sexual orientation

Sexual orientation may be very broadly defined as a preference for sexual partners of either the same or the opposite sex, or for both sexes. It is one of the more recently recognized bases for discrimination and several terms exist, including LGBTQI, which is an acronym referring to "Lesbian, Gay, Bisexual, Transgender, Queer and Intersex" persons. Most often this acronym is used in the form of "LGBT". "Gender Identity" is another term used in the context of sexual orientation. This term refers to the psychological sense of being male or female.

The prohibition of all discrimination based on sexual orientation should include male and female homosexuals, bisexuals and heterosexuals, as well as transsexuals, transgendered persons and transvestites. Discrimination on the grounds of sexual orientation is likely to form an element in multiple or composite discrimination, insofar as someone who is homosexual or

transgendered is more likely to be vulnerable to sex discrimination as well. Bullying and harassment of people whose sexual orientation is viewed stereotypically as "abnormal" is also a common feature of discrimination.

Sexual orientation is not a criterion provided for specifically in Convention No. 111, but it is implicitly covered by Article 1.1 (b), which allows for member States to extend the prohibited grounds for discrimination as they emerge. Some States have determined that the criterion of sex includes sexual orientation.

Several countries have identified sexual orientation as a basis for discrimination. Some national and state constitutions expressly prohibit discrimination on the grounds of sexual orientation, and numerous others have addressed it in legislation in a variety of ways.

Strategic gender needs

These needs are required to overcome the subordinate position of women to men in society, and relate to the empowerment of women. They vary according to the particular social, economic and political context in which they are formulated.

Usually, they concern equality issues such as enabling women to have equal access to job opportunities and training, equal pay for work of equal value, rights to land and other capital assets, prevention of sexual harassment at work and domestic violence, and freedom of choice over childbearing. Addressing them entails a slow transformation towards gender equality.

Strategic gender needs vary in each context and are related to gender divisions of labour, resources and power and may include legal rights, protection from domestic violence, equal wages, increased decision-making, and women's control over their own bodies. Meeting strategic gender needs assists women to increase their control over their personal life and in society, thereby changing existing roles and addressing their subordinate position.

Violence at work, gender-based

Discrimination at work may be compounded by physical or psychological violence which may be gender-based. The clearest illustration of this is sexual harassment; but harassment accompanied by violence or the threat of violence need not be sexual in intent. There is a close connection between violence at work and precarious work, gender, youth, and certain high-risk occupational sectors. A young woman with a precarious job in the hotel industry or in domestic work, for instance, is much more likely to be exposed to the risk of sexual harassment than a mature male office worker with a permanent job.

National and international legislation against workplace violence and gender-based violence exists, but preventive action is essential to create and sustain a violence-free working environment where women workers can feel as physically and psychologically as safe as their male colleagues.

Gender-based violence is a very complex issue, rooted in gendered power relations in the economy, the labour market, the employment relationship, organizational culture and cultural factors.

Workplace measures to combat gender-based violence may include:

- regulations and disciplinary measures;
- policy interventions against violence;
- disseminating information about positive examples of innovative legislation, guidance and practice;
- workplace designs that may reduce risks;
- collective agreements;
- awareness raising and training for managers, workers and government officials dealing with or exposed to violence at work;

- designing and putting in place procedures to improve the reporting of violent incidents in conditions of safety and confidentiality.

Women in Development Approach (WID)

WID is an approach that was developed in the early 1970s that recognizes women as direct actors of social, political, cultural and working life and is focused on the division of labour based on sex.

The philosophy underlying this approach is that women are lagging behind in society and that taking remedial measures within the existing structures can bridge the gap between men and women. Criticism to the WID approach emerged later, stating that women's issues tended to be increasingly relegated to marginalized programmes and isolated projects. Gradually WID thinking was replaced by the GAD approach (see Gender analysis on planning).

Women's empowerment

The process by which women become aware of sex-based unequal power relationships and acquire a greater voice in which to speak out against the inequality found in the home, workplace and community.

It involves women taking control over their lives: setting own agendas, gaining skills, solving problems and developing self-reliance.

Women's empowerment perspective, within the ILO context, is to promote the equal position of women in the world of work, and to further that aim at one or more levels by:

- Promoting capacity building of women to enable them to participate equally in all societal activities and decision-making at all levels;
- Promoting equal access to and control over resources and the benefits of productive, reproductive and community activities by affirmative action for women;
- Working to achieve equality and safe and respectful working conditions;
- Promoting and strengthening the capacity of women's/development organizations to act in favour of women's empowerment and gender equality;
- Promoting changes in the socio-economic conditions in society that often subordinate women to men such as laws, educational systems, political participation, violence against women and women's human rights;
- Making men aware of the significance of gender equality.

Work-family balance

Motherhood and the gendered division of labour that places primary responsibility for maintaining the home and family on women are important determinants of gender-based inequalities between the sexes and of inequalities among women. Conflict between these family responsibilities and the demands of work contributes significantly to women's disadvantage in the labour market and the sluggish progress towards equal opportunity and treatment for men and women in employment. While women are forced, or choose, to accept poorly-paid, insecure, part-time, home-based or informal work in order to combine their family responsibilities with their paid employment, difficulties in reconciling the demands of work and family contribute to men's disadvantage in the family and limit their ability to be involved in family matters.

Workplace schedules that do not take into account workers' family responsibilities can constitute indirect discrimination in that they force such workers to "under-perform" in terms of participation in workplace activities and thus potentially damage their career development prospects. In particular, women's career advancement may suffer when they take a "career break" longer than the statutory maternity leave for the purposes of family care or take up parental leave provisions immediately after maternity leave.

However, there has recently been an increasing recognition of the importance of devising measures to help reconcile workers' family responsibilities with their work – a key strategy to facilitate women's greater participation in decent work. As clearer links have been established between the achievement of equality between women and men at home and at the workplace, the issue of harmonizing employment and family commitments for both women and men has emerged as an important labour and social policy theme in a growing number of countries.

Work-life balance

The term "work–life balance" refers not only to caring for dependent relatives, but also to "extracurricular" responsibilities or important life priorities. Work arrangements should be sufficiently flexible to enable workers of both sexes to undertake lifelong learning activities and further professional and personal development, not necessarily directly related to the worker's job.

However, for the purposes of the Convention and States' obligations in this rather vague area, the balance between work and family life is central to the principle and objectives of promoting equal opportunity. Issues related to the improvement of career opportunities, lifelong learning and other personal and professional development activities are considered to be secondary to the objective of promoting the more equal sharing between men and women of responsibilities in the family and household as well as in the workplace.

Sample invitation letter

Dear **(Director/Chief of work unit)**,

As you are no doubt aware, the **(name of your organization)** is using a Participatory Gender Audit (PGA) tool to promote gender equality using a gender mainstreaming strategy.

Objective

The main objective of the PGA is to promote organizational learning at the individual, work unit and organizational levels on how to effectively implement gender mainstreaming in the policies, programmes and structures of the organization.

A PGA is essentially a social audit and belongs to the category of quality audits, which distinguishes it from traditional financial audits. It considers whether internal practices and related support systems for gender mainstreaming are effective and reinforce each other and whether they are being followed; monitors and assesses the relative progress made in gender mainstreaming; establishes a baseline; identifies critical gaps and challenges; recommends ways of addressing them and suggests new and more effective strategies; and documents good practices towards the achievement of gender equality.

Using this participatory self-assessment methodology, gender audits take into account objective data and staff perceptions of the achievement of gender equality in an organization in order to better understand concrete and unsubstantiated facts and interpretations.

In addition, PGAs often serve as entry points for discussion of wider substantive and operational concerns. Sometimes "beyond gender" issues are highlighted, such as an organizational culture of overwork; long hours at the office; time pressures; "bead curtain syndrome", where people are only in contact vertically with their superiors and peers; or a lack of proactive structures for sharing, learning and adapting.

Methodology

The audit uses a participatory and self-assessment approach to promote organizational learning on gender mainstreaming; monitor progress; indicate gaps and challenges; and provide ways and strategies to carry out gender integration more effectively.

The PGA constitutes two main elements. The first is a global desk review of key policy documents, major publications and programming, budget, monitoring and evaluation processes that is carried out on the basis of predetermined indicators and criteria. This is used to assess the manner and extent to which gender is systematically mainstreamed in products, services and management systems.

The second is participatory workshops, which are conducted with the identified work units. Workshops for management/technical staff last for about two days. They are facilitated by a team of trained male and female staff and, where necessary, external consultants. The facilitation team is composed of three people who perform the functions of workshop facilitator, support to the facilitator, and note taker.

During the workshops, group exercises are conducted to arrive at an understanding of the level of knowledge and practice that exists on gender mainstreaming in the work unit's programme.

Challenges in implementing the gender mainstreaming strategy and positive experiences that were developed are also discussed.

Support staff are also able to reflect on their role and voice their experience of gender relations in the work unit in a proposed half-day workshop. For work units in the field, a half-day workshop is also proposed with partner organizations to obtain their views, experiences and expectations in relation to the work unit's performance on gender mainstreaming in selected programmes or areas.

A final report for each work unit is prepared by the local facilitation team within one or two days immediately after the workshop and discussed by the workshop participants. It combines the results of the global and local work unit desk reviews and the conclusions of the workshops. Recommendations are included in the final report and can be used to improve the organization's performance on promoting gender equality.

Benefits to participating work units

Work units that consider they are doing well on gender mainstreaming benefit from having this reaffirmed. They also identify good practices to reinforce their work and share with others, as well as identify ways of strengthening their performance.

Work units that want to improve their capacity for gender mainstreaming benefit through a clearer identification of challenges, needs and ways to address these.

Confidentiality

The PGA report is confidential and is not shared without the audited unit's consent, in which case anonymous syntheses of the main findings and recommendations from the different gender audits may be transmitted to senior management and **(indicate any other of the organization's governing bodies)**. Similarly, if the audited unit so wishes, information on the process and outcome of the audits may also be shared with partner organizations, the donor community, the United Nations system, and other interested organizations.

The **(name of the gender audit coordinating structure within the organization)** would like to invite you to a 3-4 hour workshop on **(date and time)** at **(place)** to reflect on the implementation of the **(organization's)** gender policy and gender mainstreaming strategy and to explore your interest in having a gender audit conducted in work unit(s) under your responsibility.

If you wish to send your representatives to the workshop, we encourage you as far as possible to send both men and women staff members as the **(organization's)** policy on gender equality concerns both sexes.

We very much look forward to hearing from you.

Yours sincerely,

Model PGA Report

Table of contents

Executive summary
(highlights main points of report including background, methodology and process,
and main conclusions and recommendations)

Acknowledgements
(people instrumental in promoting or organizing the audit within the work unit or office
and carrying it out)

List of abbreviations and acronyms

Introduction
(purpose of the audit and report, background to audit of the work unit or office
including dates and process, and members of facilitation team)

Methodology

Main conclusions and recommendations in the five Key Areas of analysis:
• Gender issues in the context of the work unit and existing gender expertise, competence
  and capacity building
• Gender in work unit's objectives, programming and implementation cycle, and choice
  of partner organizations
• Information and knowledge management within the work unit, and gender equality policy
  as reflected in work unit's products and public image
• Staffing and human resources, decision-making and organizational culture
• Work unit's perception of achievement of gender equality

Report on feedback session

Good practices

Lessons learned on the gender audit process

Annexes
(including programme of work unit audit; list of workshop sessions, participants and facilitation
programme,including transcription (or pictures) of selected workshop exercises; list of documents
reviewed; and other relevant material.

Sample skeleton of PGA Report

This can be short and simple, but it is important to recognize particular individuals or teams for having helped the process. Below is a sample text for modification:

Acknowledgements

A participatory exercise can only succeed with the active contribution of all involved. During the PGA of the (YY), all staff, as well as selected partners contributed valuable views and insights. We have attempted to capture these – and the helpful suggestions that were raised during the audit activities – in the following report.

The Audit Facilitation Team wishes to record its appreciation to the women and men of YY who took part in the workshop and interviews, and who trusted the team with their openness and constructiveness.

A special mention of thanks goes to (Ms/Mr) XX Director of YY, for his/her commitment to the gender audit process and for ensuring that staff had the opportunity to participate in PGA briefings, workshop and interviews.

The team also wishes to acknowledge and thank (Ms/Mr) Z, YY Gender Focal Point for his efficient organization of all the audit activities and his tireless cooperation with the team.

Introduction

The participatory gender audit (PGA) is one of the tools that promote the understanding of gender equality and the mainstreaming of gender concerns within YY. Conducting a PGA for YY will align the unit with the (highlight any relevant policies, programming objectives, or statements that can be used to support the mandate for gender mainstreaming)

Please find below the most current organization chart for the unit:

Organization chart:

The PGA aimed to promote learning and self-assessment about gender equality and gender mainstreaming through a participatory approach. The PGA identifies a total of 5 key areas of analysis, identified using letters A through L, in its audit methodology:

For the purposes of this Audit, these key areas have been grouped into the following clusters:

I. Gender issues in the context of the work unit and existing gender expertise, competence and capacity-building

1) Context of the audited unit and its relationship to gender issues relevant to the technical area, current gender debate and related gender-initiatives

2) Existing gender expertise, competence and efforts at capacity building

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II. Gender in work unit's objectives, programming and implementation cycles, and choice of partner organisations

1) Mainstreaming of gender equality in the unit's strategic objectives, policies, programmes and budget
2) Mainstreaming of gender equality in implementation of programmes and technical cooperation activities
3) Systems and instruments in use for accountability, evaluating and monitoring on gender equality
4) Selection of working partners

III. Information and knowledge management within the work unit and gender equality policy as reflected in its products and public image

1) Information and knowledge management on gender issues
2) Gender equality initiatives as reflected in the unit's products and public image

IV. Staffing and human resources, decision-making, and organizational culture

1) Decision-making processes including on gender mainstreaming
2) Staffing and human resources concerning balance of women and men, and gender-sensitive policies
3) Organisational culture and its effects on gender equality

V. Work unit's perception of achievement on gender equality

1) Perception of achievements on gender equality

Lessons learnt on the gender audit process

As has occurred in past audits, certain "beyond gender" issues arose; these are highlighted, where appropriate, in this report.

Methodology

The following methodology was used during the gender audit in order to collect information on the selected key areas:

- Document review and analysis of internal and public documents produced by YY
- Briefing session for all YY staff (26 April);
- Interviews with the YY Director and with the Gender Focal Point;
- Semi-structured interviews with almost all General Service, Professional staff, Team Leaders and interns. Interviews were also held with the NAME THE PARTNERS, SUPERIORS, EXTERNAL PARTNERS ETC.
- A facilitated participatory workshop of two days with the Director and with Professional and General Service staff (DATE);
- Debriefing with Director;
- Feedback session with all YY staff (Date).

The Agenda for the Workshop is attached in the annexes to this report. Other documents such as the facilitator programmes are included to provide information about the exercises used by the facilitators and the issues raised. The recommendations in the main section of the report provide the basis for YY to develop and prioritize its own Action Plan for implementation of the audit report recommendations.

The Audit Facilitation Team used a flexible approach during the workshops with staff, along with some capacity building on gender equality issues. A range of facilitated and participatory methods were used based on initial findings from the individual interviews.

In its Feedback session on XX, the Director of YY shared her willingness to consider the PGA recommendations. The Audit Facilitation Team suggests that YY recommendations be implemented in a consultative and participatory manner with all staff. The Audit Facilitators are also aware that the PGA was to be followed by a team-building retreat in June 2010, and are confident that many of the issues raised will be further addressed.

Lessons learned by the Audit Facilitation Team on the audit process appear in the final section of this report. These are highlighted in order to contribute to continuous learning about how to improve the gender audit methodology from the point of view of organization and facilitation.

MAIN FINDINGS AND RECOMMENDATIONS

I. Gender issues in the context of the work unit and existing gender expertise, competence and capacity-building

Current gender equality issues and international/national gender debate

Background (if necessary, quotes from governance documents, policies etc):

Findings:

Sdfjarg9bargwpgoasbmsbfmbpàko
Iowgnsdiogrgjirwogwewfklvmeeèbvgmepepwgbhopbmpo

Good practices:

kfjasdlfgjriotwrgsdvkldfiogjpwaefjsdlvmdsm

Recommendations:

Fjgoeeptugnafgalrgrtiqrtogéldfgnatoertredv sdlfkjaégt

Existing gender expertise and strategy for building gender competence

Findings:

Good practices:

Recommendations:

Continuing with this pattern through all five Key Areas of Analysis

Annexes to the Report

Document review list

A simple list of the documents reviewed by thematic areas is sufficient as an Annex to the Report. Some facilitators choose to elaborate and provide a sample of good practice documents. In this case, a short comment box may be added to the basic information about documents, as per the examples below.

Thematic Area	Title	Year	Comments (for example)
Facilitate by grouping documents by Key Areas of analysis	Title of the document	2003	Excellent analysis of the gender issues and the impact on women and girls, sociological analysis, forms of exploitation, welfare facilities and opportunities afforded for economic empowerment, use of focus groups, involvement in trade union leadership etc. Also brought out men's issues and comparisons made to show gender differences.
		2006	Clear reference to gender in scope and background of publication - as one would expect from a document of this nature. There is awareness of differences in impact of HIV and AIDS on women and men, and this is closely reflected in proposed prevention measures. A good practice document!
		2007	

Calendar of Interviews

The calendar of the PGA interviews should be annexed to the Report so that there is a clear record of who was interviewed.

Schedule of Gender Audit Workshop

A record of the exercises covered will be useful for future reference.

List of participants –Audit Workshop

Similarly, a list of workshop participants will also be a useful record

Selected Workshop exercises

Some of the workshop exercises lend themselves well to transcription, and pictures may be taken of others. If some exercises did not reveal enough relevant information these may be omitted at the discretion of the facilitators

Some examples:

Gender Perceptions and Stereotypes

This exercise was chosen both as an ice-breaker and also to conduct a first sweep of participants' willingness to probe truths and stereotypes. Sub-groups were formed and each discussed and presented what they appreciated and did not appreciate regarding their own sex and the opposite. A general discussion ensued regarding gender stereotyping and its impact on the workplace.

Facilitators may wish to reproduce the flip-charts presented by the sub-groups.

Historical timeline

The exercise gives an overview the participants' knowledge of key gender events or good practices of gender mainstreaming, both at the international, national, organisational and unit level, as they put up gender related milestones on a historical timeline. The exercise also shows the history of the unit's products on gender related outputs.

Facilitators may wish to take a picture of the time-line and incorporate into the annex.
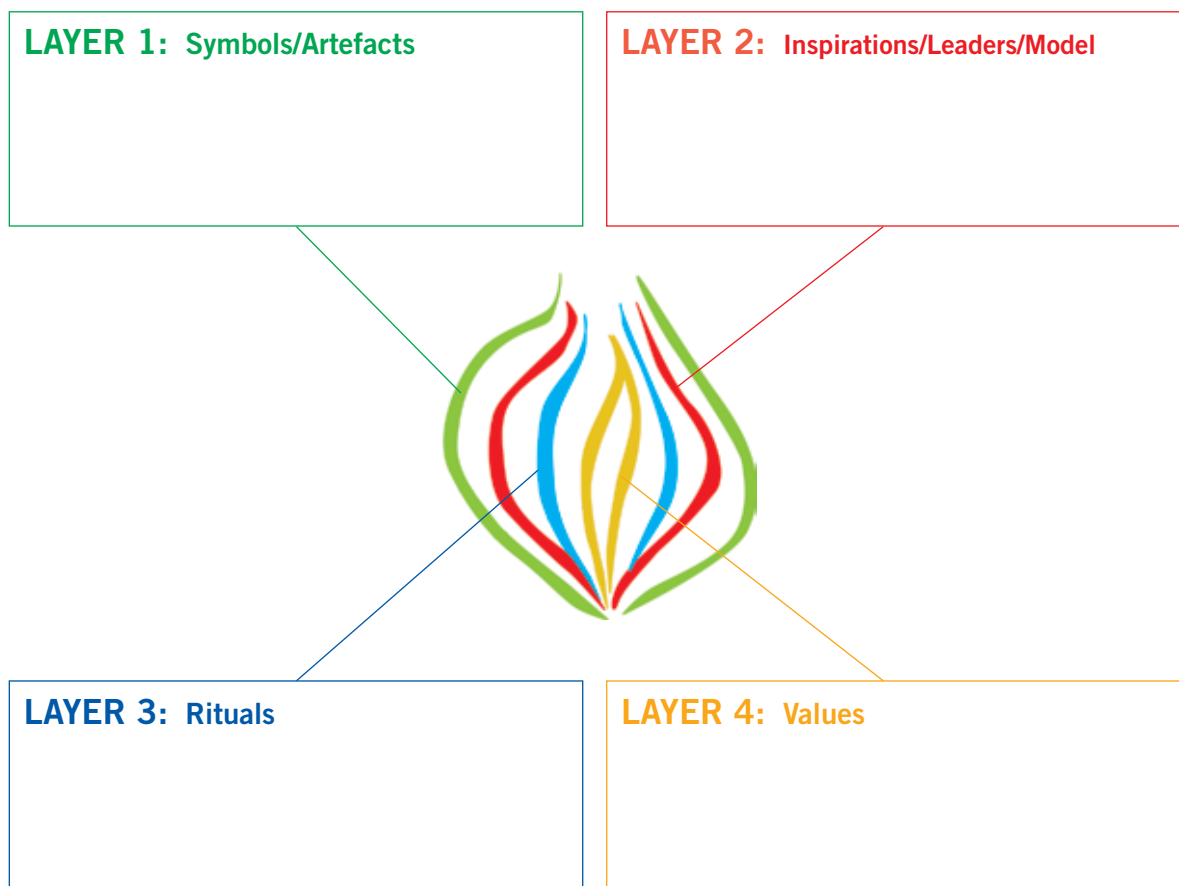
Gender Knowledge and Awareness

Selected concepts were debated in sub-groups and then discussed in plenary, serving both as a self-learning and as a capacity-building exercise. Each group of 2-3 participants were given concepts to discuss and then to elaborate on their reasoning behind the definitions they proffered. The definitions in the Gender Audit Manual glossary were subsequently read and the comparisons and differences recognized.

VENN diagram

The exercise identifies and analyses internal and external stakeholders in the unit vis-à-vis promoting gender equality. The participants draw a diagram that indicates actors, their proximity to, or distance from, each other in the work unit and their roles, while also indicating whether the relationship is driven or influenced by gender equality or not. The diagrams give an overview of existing gender expertise and competence, and how the unit is linked to national gender machineries and women's organizations.

Again, a picture of the diagrams drawn in the workshop session may prove to be a useful record.

Culture of the Work Unit (Hofstede's Onion Exercise)

LAYER 1: Symbols/Artefacts

LAYER 2: Inspirations/Leaders/Model

LAYER 3: Rituals

LAYER 4: Values

Ideal Organization

This exercise leads to the development of a vision about the ideal unit, how its work could mainstream gender and promote gender equality and probed how managers and staff could contribute to such a unit.

(Note: The two columns do not always relate horizontally.)

Current reality	Ideal Unit

The four pillars of the Participatory Gender Audit methodology

An innovative approach in the ILO PGA is the use of participatory workshop exercises that encourage optimal interaction and dialogue among the participants. The methodological underpinnings of the participatory exercises comprise four fundamental pillars:

- The Gender and Development Approach (GAD)
- The Qualitative Self-Assessment (QSA)
- The Adult Learning Cycle (ALC)
- The Learning Organization (LO)

First pillar: The Gender and Development Approach (GAD)

The GAD emerged in the 1980s focusing on inequality between men and women. The term "gender" was coined and used as an analytical tool as awareness increased of the inequalities arising from institutional structures that favoured men. GAD focuses on:

- Women as an isolated and homogeneous group; and
- The roles and needs of both men and women.

Given that women are usually disadvantaged socially and economically when compared to men, the promotion of gender equality implies explicit attention to women's needs, interests and perspectives. The objective then is the advancement of the status of women in society, with gender equality as the ultimate goal. The recognition of the need for proper planning in resolving gender inequality has resulted in more attention being given to the organizational issues involved in changing relations.

A number of the workshop exercises are designed to garner information on organizational culture.

Second pillar: The Qualitative Self-Assessment (QSA)

Any change, including organizational change, requires that the focus be put on tangible as well as intangible factors. Facts, as well as the interpretation of facts, have to be taken into account, balancing both objective data and subjective perceptions. There are always differences between the way people act and the way they think they act, just as there are differences between the way organizations act and the way they think they act. These different perspectives seem especially relevant when considering gender equality and women's empowerment issues.

QSA allows work unit staff to ask questions such as:

- Why are things the way they are?
- How did we get to where we are?
- Why do we act the way we do?
- What are the forces of change?
- Where are the forces that make change possible?
- Are we doing the right things?
- Are we doing the right things in the right way?

QSA does not aim to establish "the objective truth" but rather a consensual understanding of the reality in which people are working and which they are creating together.

In the context of the gender audit, this self-assessment establishes a consensus on how the unit is working towards gender equality. It motivates participants to probe for and understand the deeper reality behind the statistics, data and experiences.

This methodology is undeniably subjective. However, information gained through self-assessment can be cross-checked against that provided by a range of other means used in the audit, such as the desk reviews, the staff interviews, and the views of key individuals from among the partner organizations and other partners.
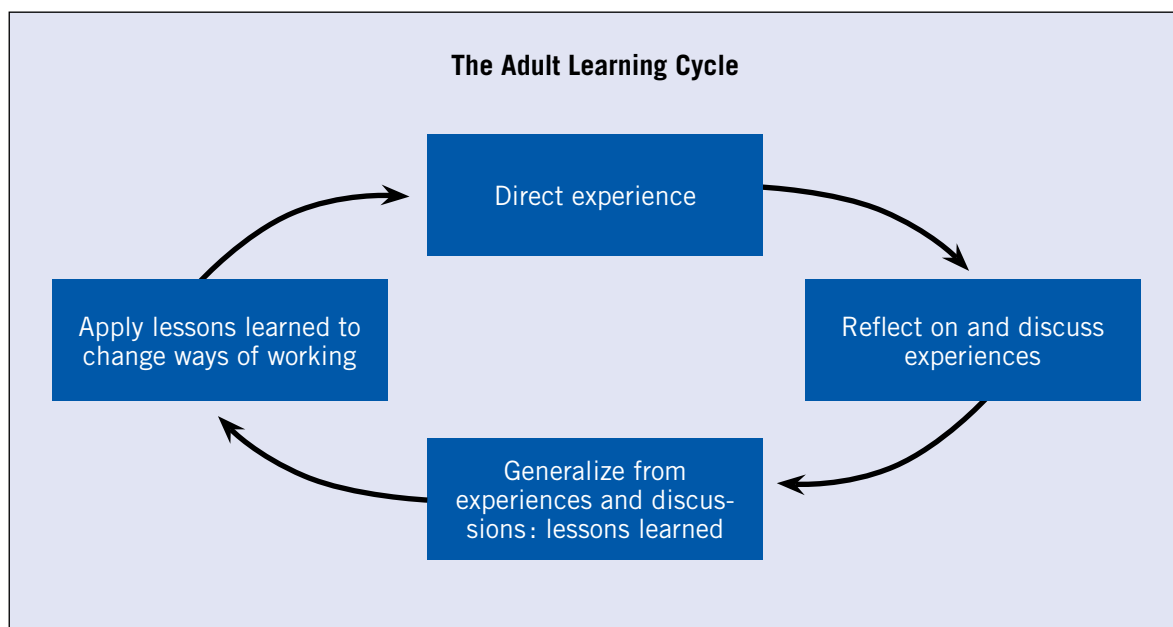
Third pillar: The Adult Learning Cycle (ALC)

In organizational settings, as in other areas of life, practical, problem-oriented learning usually takes place "on the job" and is a direct result of concrete experience. However, transposed to organizations, the reality of gender mainstreaming does not always match the organization's policy on gender mainstreaming.

The audit workshops aim to discover the extent of this lacuna and to foster a learning process that leads work units to redress the gap.

The ALC is used as a guide in selecting the methods or exercises for the design and delivery of audit workshops. The methodology is a good example of problem-oriented learning in relation to gender audit workshops for the following reasons:

* Through reflection and exchange, participants are able to translate their own experiences into general and abstract conclusions relevant to their work unit and to the work unit as a whole;
* Turn them into proposals for change through experimentation.

The Adult Learning Cycle

Direct experience

Reflect on and discuss experiences

Generalize from experiences and discussions: lessons learned

Apply lessons learned to change ways of working

The adult learning cycle is particularly applicable to gender audit workshops. It enables participants to link learning to effective changes in the way they work.

Fourth pillar: The Learning Organization (LO) approach

Learning and change in organizations take place at the level of:

- The individual;
- The work units; and
- The organization.

Organizations set the agenda for learning through their objectives, vision and mandates. Actual learning can take place and be linked from the individuals to the work unit, and from the work unit to higher organizational levels. If individuals and work units do not learn, the organization may not be able to adapt to the multiple demands that a rapidly changing environment places on it.

The gender audit involves assessing, learning and changing at all three of the above levels.

- The ILO approach focuses both on organizational objectives and on the changes required of individuals working in the organization.
- The intermediate level is the work unit, which transmits learning and change in both directions between the individual and the policy and strategy setting levels of the organization. A successful learning organization promotes three "loops" of learning: single, double and triple:
- Single loop learning occurs when a practical problem has to be solved. The actual situation is analysed and changes are implemented accordingly.
- Once the problem is solved, double-loop learning may lead to reflection by individuals (or units) on their own contribution to the creation of the existing problem. This may happen inadvertently.
- Triple-loop learning examines the implicit assumptions held by individuals, work units and organizations. This type of learning challenges the existing intellectual models and encourages analysis of what has been learned and how it happened.

All three types of learning have a place in the participatory gender audit methodology. The emphasis, however, is on double-and triple-loop learning, because these can lead to real change.

If individuals and work units do not learn, the organization may not be able to adapt to the multiple demands that a rapidly changing environment places on it.

Benefits of the methodology

By promoting self-awareness at the level of the individual and the organization, the methodology leads to the identification and implementation of good practices and, ultimately, to the achievement of the gender mainstreaming goal.

The advantages of applying the four-pillar approach to conducting the workshops ensure that:

- Recommendations in the report are easier to follow-up with concrete actions;
- Participants can reflect and get ideas about improving their work on gender equality;
- Good practices are identified;
- Ideas on the implementation of gender mainstreaming can be shared;
- Organizational culture is analysed and renewed impetus from the process makes it more gender responsive;
- Team-building is accentuated and as a result teams gain collective learning experiences;
- Audit methods and exercises can be tested, modified or adapted by work units for other uses;
- Individuals/teams are challenged to assess themselves critically for effective learning;
- The information collected can be used as a benchmark for future improvement on gender mainstreaming.

A MANUAL FOR GENDER AUDIT FACILITATORS
THE ILO PARTICIPATORY GENDER AUDIT METHODOLOGY

This revised Manual is based on the ILO's practical experience of piloting Participatory Gender Audits (PGAs) of many ILO technical units and country offices, constituents and UN partners from 2001 to 2012. The first of its kind in the UN system, the methodology provides gender audit facilitators with guidelines and practical instructions on how to plan and implement PGAs in an organizational context, with a step-by-step approach that leads facilitators through each stage of the audit process.

It is hoped that this revised Manual will be a valuable updated resource as a training guide for different institutions for gender mainstreaming. Since it is a process-oriented organizational tool specifically aimed at gender audit facilitators, it has great potential for further adaptation and use by the ILO's constituents, UN agencies, women's groups and other civil society organizations. The revisions have been found to further strengthen the PGA methodology, providing more detailed advice on how to carry out the process in practice during PGAs.