



International
Labour
Office

A MANUAL FOR GENDER AUDIT FACILITATORS

THE ILO PARTICIPATORY
GENDER AUDIT METHODOLOGY



A GENDER
EQUALITY
T O O L

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by Catherine Hein

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Edited by Martha Fetherolf Loutfi

This important anthology of articles from the *International Labour Review* brings together the thinking of leading philosophers, economists and lawyers on this complex subject. It illuminates questions such as how we should define equality, what equal opportunity means and what statistics tell us about differences between men and women at work, how the family confronts globalization and what is the role of law in achieving equality. Policy issues examined include how to deal with sexual harassment and wage inequality, part-time work, the glass ceiling, social security, and much more.

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ABC of women workers' rights and gender equality. Second edition

This concise and easy-to-read guidebook assists the layperson in understanding the legal frameworks and socio-economic developments surrounding gender equality in the world of work. It incorporates important information relevant to women workers such as women in development, gender mainstreaming, the glass ceiling and much more. Each entry provides a clear, succinct definition and directs the reader to relevant laws, ILO Conventions, and other topics for further research.

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A MANUAL FOR GENDER AUDIT FACILITATORS

**THE ILO PARTICIPATORY
GENDER AUDIT METHODOLOGY**

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, 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.

A MANUAL FOR GENDER AUDIT FACILITATORS

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FOREWORD

“The Office must now work to ensure that commitment to gender equality is internalized throughout the ILO and reflected in all our technical work, operational activities and support services.”

Juan Somavia
Director-General
International Labour Office, 1999

This Manual provides gender audit facilitators with guidelines and practical instructions on the planning and implementation of participatory gender audits in an organizational context. Its content and structure are based on training materials that are being used to train facilitators undertaking participatory gender audits within the ILO. It has been published 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 gender audits within their own organizational context.

A step-by-step approach is used that leads facilitators through each stage of the process culminating with a set of recommendations and an action plan on how to improve the gender mainstreaming strategy in a given institutional setting. It also explains the rationale behind the use of the participatory methodology, its usefulness and relevance.

The first of its kind in the UN system, the ILO Participatory Gender Audit is a tool that supports an organization’s commitment to gender equality by examining the extent to which equality is being institutionalized; helping to identify good practices in technical work; and pointing to effective and efficient ways of moving forward in mainstreaming gender in all work activities. Since its launch, the Participatory Gender Audit 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.

The Manual is based on the ILO’s practical experience of piloting gender audits of many technical units and ILO country offices from 2001 to 2006. The Training Manual, adapted for the ILO, was initially developed by the Gender and Development Training Centre for the Stichting Nederlandse Vrijwilligers (SNV) in the Netherlands. The conceptual design has been converted into a logical and easy-to-use training format whilst the tools have been continuously adapted and refined in line with the ILO’s increasing experience with participatory gender audits.

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. We hope that it will contribute to building 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.

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Acknowledgements are also due to numerous other colleagues who have collaborated in conducting gender audits of the ILO constituents and UN agencies and have commented on various aspects of the Manual.

ILO, Geneva, June 2007

INTRODUCTION

Aim and objectives

The specific objectives of the Manual are to:

- Support gender audit facilitators with an easy-to-use manual for the organization, implementation and follow-up of gender audits; and
- Provide facilitators with a set of tools and practical guidelines to be used during the gender audit process.

The target audience

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

- ILO constituents, including labour ministries, workers' and employers' organizations, and other government structures;
- 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;
- 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.

Using the Manual

Structured chronologically, 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 it is thorough and results in a comprehensive product.

Part One gives an overview of the four pillars on which the participatory methodology is based. It outlines 12 key focus areas for collecting the information that will be needed throughout the audit and for guiding the formulation of the recommendations.

Part Two provides all the practical information (what, how, when and with whom) related to the audit process (putting the team together, preparing the activities, carrying out the desk reviews, organizing the interviews, conducting the workshops, and drafting the report and recommendations). This part, together with **Part One**, constitutes the core of the Manual and following it step-by-step ensures consistency and maintains a clear information flow between the audit team members and the audited unit.

The importance of preparatory work cannot be over-emphasized, particularly:

- The appointment of the focal person from the audited unit;
- Rapport development with the focal person and among the audit facilitation team members;
- The planning of the gender audit calendar; and
- The pre-discussion on the audit process to be followed.

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. The exercises are divided into two main groups: core and optional. Core exercises are carried out in all gender audits. Optional exercises can be selected according to the audited unit's needs. Some exercises can be shortened or extended but the reason for any change needs to be clear and the implications for information requirements assessed.

Since the gender audit methodology promotes learning at organizational, unit and individual levels, the exercises can be used for training on gender mainstreaming in addition to monitoring and assessing, which means that the Manual can be used as a training tool to promote gender equality.

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 ILO gender audits;
- The criteria and format for document analysis;
- A glossary of key concepts related to gender equality relevant to the audit;
- Sample invitation letter;
- Sample gender audit calendar;
- A model audit report;
- References to other gender audit materials; and
- A CD of the Manual.

General tips for gender audit facilitators

One of the main roles of the gender audit 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 vertical differences, and encouraging opinions that differ from those of the “leader”. It is therefore important to:

- Devote the time needed to conduct the audit in the most effective way. Facilitators should try to ensure their availability to work as a team for the 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. Improvisation during an audit is detrimental to both the outcomes and the credibility of the audit.

- Ensure that the report belongs to the audited unit. The facilitation team writes the report on the basis of the outcomes of the activities carried out during the audit process. The feedback session aims to share the report's main findings and recommendations. In case of disagreement with the unit, the facilitation team should discuss their concerns openly and be willing to integrate any changes the audited unit considers necessary in order to better reflect the work of the unit.
- 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 gender audit. 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.

PART ONE : AN OVERVIEW OF THE PARTICIPATORY GENDER AUDIT METHODOLOGY

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 gender audit:

- 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;
- 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, participatory gender audits 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;
- Long hours at the office; time pressures;
- The “bead curtain syndrome” (where people are only in contact vertically with their superiors and peers); and
- The lack of proactive structures for sharing, learning and adapting.

How does a participatory audit differ from a traditional one?

- Audits have been traditionally used by businesses to determine if established administrative and financial rules and regulations are being followed correctly. In the 1980s, many large companies began using “quality audits” to measure how well internal and external demands were being met. These types of audit establish whether internal arrangements are appropriate and attuned to each other, whether the arrangements and their related rules are being followed, and how to improve and innovate in this area.
- Quality audits evaluate the organization’s written policies, documents and handbooks and determine if members actually apply these – and if so how well and with what results. They reveal not only if the job is being done the right way, but opportunities to improve and innovate. For this reason auditors collect and analyse the perceptions of people working in the organization and its clients. Thus the audit report contains recommendations about potential improvements and how to effect these. Relevant and responsible actors then use the report to produce an action plan.
- Participatory gender audits belong to the category of quality audits, also known as social audits to distinguish them from financial audits. The ILO uses a participatory approach in its gender audits in order to promote learning and ownership of the process and outcome. It is also used because individuals employed in ILO programmes, constituents and partner organizations are considered to have the motivation and capacity to assess themselves and their organizations.

Aim and objectives of gender audits

The overall aim of a gender audit 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
- Individual

The gender audit’s 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;
- 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 the audit is a report that includes 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 gender audit:

- 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.

Twelve key areas of analysis

Twelve key areas guide the audit analysis.

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

The following 12 key areas represent the focus of analysis during a participatory gender audit. The questions are designed to raise awareness in each key area. They are intended to familiarize the facilitation team with the issues that will generate important information but are not to be used as a checklist or questionnaire. It is important that at the end of the audit enough information will have been collected to enable the audit team to report on each area. For this purpose, the participatory workshop exercises in Part Three indicate which of the 12 key areas they cover.

This list of 12 key areas is presented and distributed to the participants during the introductory session.

A	Current national/international gender issues and gender debate affecting the audited unit ; and unit's interaction with national gender machineries and women's organizations
B	Organization's mainstreamed strategy on gender equality as reflected in the work unit's objectives, programme and budget
C	Mainstreaming of gender equality in the implementation of programmes and technical cooperation activities
D	Existing gender expertise and strategy for building gender competence
E	Information and knowledge management
F	Systems and instruments in use for monitoring and evaluation
G	Choice of partner organizations
H	Products and public image
I	Decision-making on gender mainstreaming
J	Staffing and human resources
K	Organizational culture
L	Perception of achievement on gender equality

The questions below are designed to help audit facilitators obtain information in each of the 12 areas.

A	<p>Current national/international gender issues and gender debate affecting the audited unit, and unit's interaction with national gender institutions and women's organizations</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • Does the work unit interact actively with national gender institutions and women's organizations working for women's advancement or with international gender networks for gender equality? What is the nature of these relationships? • Does the work unit maintain contacts with representatives of 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? • Is the work unit aware of the manner in which the Platform for Action of the 1995 Beijing Women's Conference and the recommendations of the 1995 Copenhagen Social Summit as well as those of Beijing +5 and Beijing +10 are being implemented? • Have the Beijing Platform for Action and the gender paragraphs of the Copenhagen Commitments and Beijing+5 and Beijing +10 influenced the work unit's programming? • Has the work unit identified institutions that pose constraints to its achievement of gender equality?
B	<p>Organization's mainstreamed strategy on gender equality as reflected in audited unit's objectives, programme and budget</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • 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? • Are gender equality objectives incorporated into the work unit's work plans? • 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, or is the reverse true? • How are the responsibilities for gender mainstreaming shared at different levels in the work unit?

C	<p>Mainstreaming of gender equality in the implementation of programmes and technical cooperation activities</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • How is attention to gender 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 both regular budget allocations and extra-budgetary 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? • Are staff members encouraged to earmark funds for gender mainstreaming in technical cooperation projects?
D	<p>Existing gender expertise and strategy for building gender competence</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • Is there a common understanding among work unit staff of gender and gender mainstreaming on which dialogue and performance indicators can be based? • 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 dispersed or available in the organization? • How is gender competence distributed between male and female staff, gender focal points and others working in the field and at headquarters? • How much time do gender focal points spend on gender-related tasks? • How much training and follow-up have work unit staff received and at what levels (basic, awareness raising, planning, training-of-trainers, etc.)? • 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?

E	<p>Information and knowledge management</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • Is information collected, adapted, disseminated and used in a structured manner? Is someone assigned to this task? • Are 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 on 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? • Is access to the Internet available, and if so, to whom? 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?
F	<p>Systems and instruments in use for monitoring and evaluation</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • 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? • Are 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?
G	<p>Choice of partner organizations</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • Have partner organizations been selected according to their capacity or perspective on gender equality? If not, why have they been selected? • Why have other partner organizations not been selected? • What is the effect of this choice on mainstreaming gender equality? • What contacts does the work unit maintain with feminist, women's, human rights, secular or religious organizations?

H	<p>Products and public image</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • How do partner organizations and other partners 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 partners 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?
I	<p>Decision-making on gender mainstreaming</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • How are decisions taken in the work unit: to what degree are people left out or included, partially- or fully-informed, informed in a timely manner or not? • 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? Where does the impetus come from? • What is allocated and spent on mission credits for each official? • Who is involved (women and men) 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 gender equality strategy of the work unit? • How much money is spent on promoting women's representation at senior levels of management?
J	<p>Staffing and human resources</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • 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 action, additional facilities, targets, and training? • Are initiatives taken by managers to facilitate women to break through the glass ceiling? What are they? • Are recruitment and selection procedures transparent and gender-sensitive for all types of jobs, including technical cooperation? • Does the work unit respect family-friendly policies and work/life balance? • What is the staff salary distribution in the work unit (sex-disaggregated according to level)? • 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?

K	<p>Organizational culture</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • 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 seriously 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 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 favourite 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 open is the work unit to the public display of its strengths and weaknesses? • 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?
L	<p>Perception of achievement on gender equality</p> <p>Guiding questions</p> <ul style="list-style-type: none"> • Do work units have ideas about the relative success and outcomes of their work on gender equality? Qualify these perceptions in terms of: <ul style="list-style-type: none"> – Changes resulting from the work done; – Their importance; – Their relation to the objectives of the organization's 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.

The four pillars of the Participatory Gender Audit methodology

An innovative approach in the ILO participatory gender audits 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.

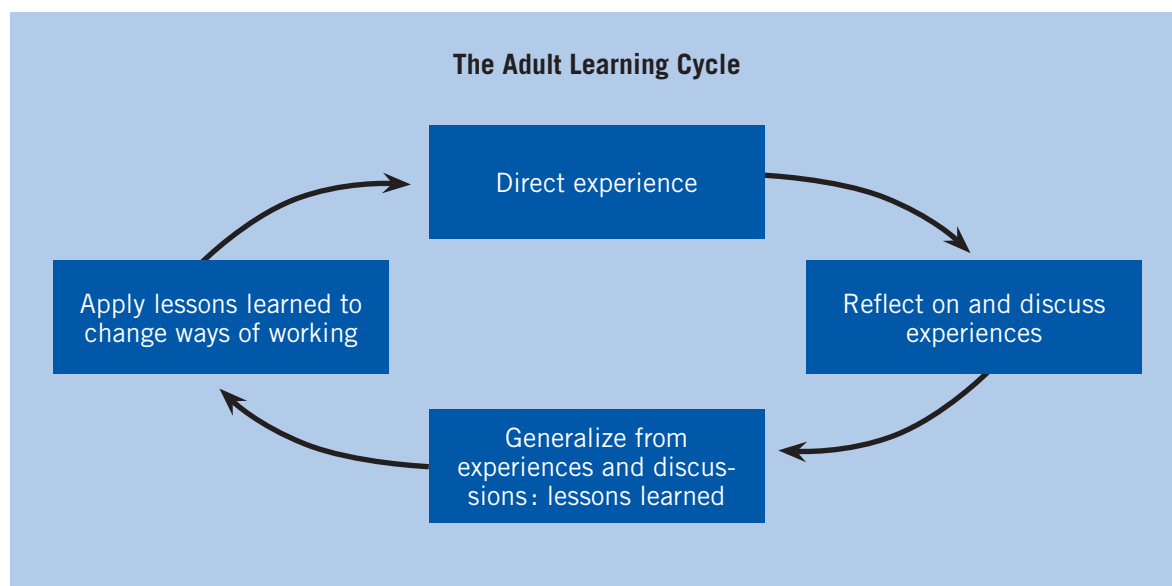
Third pillar: The Adult Learning Cycle (ALC)

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 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.

PART TWO: THE IMPLEMENTATION PROCESS

Gender audit timeline and stages at a glance

This part of the Manual describes the steps to be followed for a successful gender audit. It follows a chronological order and gives detailed information on what to do at each of the different stages of the audit. 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.

Before the audit

- The gender audit coordinating structure invites work units to volunteer for audits
- Submission of proposals by work unit directors
- Identification and agreement on work units to be audited
- Appointment of a contact person by the director of the unit
- Work unit planning and preparation for the audit
- Call for facilitators to form audit facilitation teams
- Formation and coordination of the audit facilitation team
- Desk review materials collected and sent to the facilitation team
- Two weeks prior to the audit, facilitation team begins initial review of documents

At the beginning of the audit

- Audit facilitation team meeting
- Audit facilitation team meets the work unit director
- Audit facilitation team meets the entire work unit

During the audit

- Desk review carried out and outcomes discussed
- One-on-one interviews carried out with work unit director, senior managers, management/technical staff, and support staff
- Support staff workshop conducted
- Management staff workshop conducted
- Field: Consultations with partner organizations, implementing partners and women's organizations

At the end of the audit

- Preparation of executive summary of audit's findings
- Debriefing of work unit director
- Feedback session with work unit staff

After the audit

- Draft final audit report
- Follow-up action on audit recommendations by the work unit and other relevant units

Before the audit

The gender audit is an intensive and time-consuming exercise.

Inviting work units to volunteer for audits

The gender audit's coordinating structure sends an invitation to the work unit directors requesting them to identify units under their responsibility that might be interested in participating in the gender audit.

Submission of proposals by work unit directors

The invitation is passed to the unit's senior managers who, if interested, study their programmes and availability and consult with staff prior to taking a decision regarding participation in the audit.

- Unit directors should be aware that the gender audit is an intensive and time-consuming exercise. The audit should only be undertaken if the director is fully committed to the work involved in planning the audit and is prepared to allow unit staff to participate in interviews, workshops and information sessions during the course of the two-week audit;
- A gender audit should not be planned during periods of intense work activity for the unit and staff missions should be kept to a minimum.

Identification and agreement on work units to be audited

After consultation with unit directors and/or field directors, the senior managers communicate the names of the units that have volunteered to be audited with proposed dates.

The gender audit coordinating structure initiates the following process :

- Considers all the proposals bearing in mind the time and resources available and the work units' geographical and sector balance;
- Selects the units for gender audits;
- Communicates the selection to the directors and senior managers of the work units that had volunteered;
- Begins the planning process for each of the audits;
- Finalizes dates for the audits with the unit directors, if necessary.

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 gender audit 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 gender audit file;
- Planning the schedule of the one-on-one interviews conducted by auditors 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 audit 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.

Responsibilities of work unit contact person

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

KEY TO THE GENDER AUDIT'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 documents and products generated by your unit in recent years ;
- **Communicating information** about the gender audit 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 gender audit (for the preparation of the invitation letters ;
- **Providing an office** for the audit 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 the participants 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 audit

When agreement on the gender audit and the proposed dates has 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 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 ;

- Prepare their participation in the gender audit workshops by ensuring they are acquainted with their unit's activities on gender mainstreaming. This promotes effective contribution and a sense of ownership of the process by all those involved;
- Familiarize themselves with the following documents from a gender perspective: their organization's gender equality and mainstreaming policy or plan, the work unit's current and future programmes, and in the case of development programmes or projects, their project documents.

Call for facilitators to form audit facilitation teams

The gender audit coordinating structure calls for volunteers from a pool of trained facilitators to form a team of three or four members. Ideally, they should fulfil the following criteria :

- Gender balance ;
- Some technical knowledge related to the work of the audited unit ;
- Experience with gender audits.

Each team comprises either a gender audit coordinator, an 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.

Formation and coordination of the audit facilitation team

To carry out a successful audit, 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 ;
- Advises auditors of the composition of the team assigned to the audit ;
- 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 audit is in the field, travel arrangements and arrival/departure schedules need to be coordinated ahead of time.

Audit facilitation team meeting

Building the team

At the beginning of the audit, 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 gender audit 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.

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 audit methodology and sharing experiences

The team should take advantage of this initial period to review the audit methodology together and to share individual experiences. Some members may have already participated in previous audits 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 audit as it progresses

From the earliest stages, team members share issues that they have identified that may require more probing and insight. These issues could be explored during the desk review, in the one-on-one 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.

Keeping notes on the audit 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 audit report. 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.

Audit facilitation team meets the unit director

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

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 audit. 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 meeting to be held on the first or second day of the audit. This meeting lends credence to the audit and familiarizes work unit staff members with the aims of the audit and introduces them to the audit facilitation team.

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 a matrix for report writing

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

- Develop a matrix for report writing;
- Decide on the division of labour for writing the different sections of the report; and
- Select someone to consolidate the final version.

The facilitation team writes the final report, which forms the basis for subsequent action by the work unit. The director and the staff of the work unit are responsible for implementing the report's recommendations and for monitoring improvement in gender mainstreaming. The gender audit coordinating structure assists the audited unit to follow-up on the recommendations in the report.

Guiding principles for the report

The facilitation team members should emphasize throughout the audit 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 available on the Internet or in some other form for distribution;
- The report should be completed and submitted to the director of the work unit before the team leaves the unit. 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;
- The final report should be no more than 30 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.



A practical tip

Make notes in a computer file at the end of each day to build up the information base for the report.

What is a gender audit desk review?

Each gender audit of a work unit begins with a desk review carried out by the gender audit facilitation team. Desk reviews can take place at the level of a :

- Department
- Programme
- Unit
- Area office
- Sub-regional office
- Regional office

The purpose of a desk review is threefold:

- It provides quantitative and verifiable information to be used as baseline data to complement the results of the participatory audit workshops and interviews;
- The information that it generates feeds into the participatory process as material for discussion and appraisal by participants; and
- The desk review establishes a benchmark for gender mainstreaming in future documents.

How is a desk review carried out?

Team members fill in :

- Document analysis tables
- Document category summaries
- Unit document review summary
- Report skeleton

Before the facilitation team begins its work :

- The work unit collects documents for the gender audit file;
- Each work unit identifies what it considers to be its “flagship documents”. These documents provide a view of the unit’s overall objectives and daily activities;
- A key contact person is nominated to 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, interest and/or location. Team members who are in communication with the rest of the team by e-mail receive documents in electronic form;
- No two members receive the same document to review;
- All team members have access to the work unit’s Internet/Intranet web sites;
- 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 key activities and issues related to the audited unit and begin an initial review two weeks ahead of the official start of the audit. The facilitation team coordinator distributes documents to team members.

On receipt of their assigned documents, team members :

- Determine their gender sensitivity using the document analysis tables (see Part Five: Annexes);
- 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;
- Fill in a document category summary for each category of document and the unit document review summary, which covers the entire desk review. These will be appended to the final report.

The gender audit file is one of the principal sources of information for the assessment of the programme. It is the source of documents for the desk review. It provides the facilitation team with information on the programme, which will be used in the audit report.

The gender audit file serves to cross check the qualitative self-assessment findings.

Materials for the gender audit file

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 personnel policy and procedures;
- Programme and budget documents;
- Office floor plans.

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.

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.

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).

Gender-specific

- All relevant gender-related documentation.

How to choose documents for the desk review

Documents for the desk review are chosen from the audit file. In consultation with the work unit, 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 audit, with the exception of earlier key materials, which are still in use.

Depending on the size and scope of the work units and offices, facilitation teams may not need, or be able in the time available, to review examples of all these kinds of documents, but should include as wide a variety as possible.

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

- From the point of view of gender mainstreaming, it is the mainstream documents that 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.

A practical tip



It is not necessary to photocopy all the documents to be reviewed for the audit. They need only be identified and gathered in advance so that the facilitation team can read them in the first days of the audit process (see Part Five: Annexes for Sample gender audit calendar).

The facilitation team should preferably be able to consult the files in one place thus obviating the need for many photocopies, which will not, in any case, be taken away by team members after the audit.

What kind of information does the desk review cover?

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

The 12 key areas mentioned in Part One help facilitation teams to direct their analysis of the audit 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.

GENDER SENSITIVITY: 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 (see Part Five: Annexes) help auditors 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.

The document analysis tables and summaries

Document analysis tables cover three categories of documents:

- Administrative
- Technical/substantive issues
- Information/promotion

Document analysis tables and category summary tables are tools that quantify information as a baseline for future action.

It is important that each document be listed by title using as many forms as needed and following the instructions provided.

- A document category summary table is provided for each category. This allows the team to provide a snapshot of the gender sensitivity of documents in each of the four categories.
- A unit document review summary table allows the team to tabulate information from all four categories and to make qualitative judgements in two areas :
 - The unit's gender-specific documents ; and
 - The availability and usage of documents.
- Comments should be added to the numeric ratings given to the documents. These comments are very valuable to the audit and can raise important issues, especially when planning one-on-one interviews and audit workshops.

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.

Key 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-sensitive rather than gender-blind and/or sexist. This means that it should include both women and men and boys and girls.

Gender-sensitive 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-sensitive 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” or “mariner”; 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 broken down by sex. For example, instead of “informal economy workers” use “men represented 20 per cent of informal economy workers and women represented 80 per cent”; instead of “...all poor farmers said the changes affected their...” use “only 10 per cent of poor male farmers, but more than 45 per cent 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 contact person will have already set up a schedule of interviews prior to the audit, and the facilitation team will have had the chance to study and approve the schedule. An attempt should be made to give all members of the work unit the opportunity to express themselves.

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.

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 feel 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 one-on-one 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 auditors can use in their interviews.

The statements for evaluation in the document analysis tables (see Part Five: Annexes) can also be used as models for developing the questions.

Assign facilitators to interviews

The facilitation team decides on the process for assigning members to interviews.

All interviewers explain the approach of the gender audit, the purpose of the interview and its contribution to the gender audit process at the start of each interview. Not only does this inform the interviewee but it also sets a professional tone for the session.

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.

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 staff. Ideally, auditors who reviewed a manager's work should also be assigned to their interview.

A wealth of information may be gleaned from interviews with support staff. They have insight into the administrative background of many decisions taken and into both 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 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 their sources and the confidentiality of the information gathered. Given that the purpose of the audit is to gather information regarding a unit's work on gender equality, and one of the tools at the disposal of the auditors is the interview process, the information is not deemed confidential if it is to be recorded in the overall findings of the audit.
- Auditors 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 auditor should talk to other team members and assess whether the issues should be brought to the attention of the gender audit coordinating unit and the organization's human resources department.

Conducting individual interviews

Preparation is the key 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	<ul style="list-style-type: none"> • Break the ice with appropriate non-threatening topics • Be friendly but avoid excessive small talk • Present interview agenda / timing • Let the interviewee know you will take notes
2	Control the interview	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Get key ideas / information and fill in details later
6	Deal with questions	<ul style="list-style-type: none"> • Make sure you give enough information to clarify • Do not answer questions if you feel they are inappropriate
7	Close the interview	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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.

Observing:

Watch the other person's non-verbal signals, e.g., body language, reactions, preferences, listening clues.

Listening actively:

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.

Questioning:

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

Presenting:

Interviewees may also ask questions or request clarifications. Be informative without giving explanations that complicate the issue. Be professional and discreet.

KEY STEPS IN THE PARTICIPATORY GENDER AUDIT PROCESS

- Work unit volunteers for gender audit and sends request to the gender equality coordinating structure;
- Formal commitment is made on audit 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 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 is set up;
- Draft report is submitted to the work unit within a month for comments on factual content;
- Report is completed by the following month;
- Work unit is responsible for initiating implementation of audit recommendations.
- The gender equality coordinating structure in the organization provides technical advice on the implementation of the recommendations.

Model gender audit planning calendar

Day 1 – Monday	Day 6 – Monday
<ul style="list-style-type: none"> • Facilitation team meets • Coordination meeting with focal person • Meeting with unit director • Meeting with entire unit team • Confirm interview schedule for unit staff • Discuss interview questions • Discuss document review 	<ul style="list-style-type: none"> • Consolidate workshop notes and integrate into draft report • Finalize document reviews • Plan workshop with partner organizations
Day 2 – Tuesday	Day 7 – Tuesday
<ul style="list-style-type: none"> • Conduct interviews • Plan workshops with management/technical staff and support staff • Prepare skeleton report format 	<ul style="list-style-type: none"> • Conduct workshop with partner organizations • Continue interviews
Day 3 – Wednesday	Day 8 – Wednesday
<ul style="list-style-type: none"> • Conduct interviews • Conduct support staff workshops • Finalize preparations for management/technical staff workshops 	<ul style="list-style-type: none"> • Draft executive summary for audit report • Complete consultations
Day 4 – Thursday	Day 9 – Thursday
<ul style="list-style-type: none"> • Conduct management/technical staff workshop (half/full day) • Conduct interviews • Discuss report among team members 	<ul style="list-style-type: none"> • Prepare draft report main points • Prepare feedback session
Day 5 – Friday	Day 10 – Friday
<ul style="list-style-type: none"> • Management/technical staff workshop continued (full day) • Conduct interviews • Discuss document reviews • Confirm consultation schedule with partner organizations 	<ul style="list-style-type: none"> • Debrief director • Hold feedback session with entire unit • Discuss action plan • Audit team prepares to leave the work unit

PART THREE : THE WORKSHOPS

Preparing and conducting the workshops

The workshops are organized as soon as the majority of the interviews are completed. 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.

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 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 ;
- “Post-mortem” meetings are held at the end of each workshop day for the facilitators ;
- 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 in consultation with the audited unit ;
- A workshop agenda is prepared to ensure that facilitators organize their time judiciously.

Core and optional exercises

The workshop exercises are divided into core exercises and optional exercises. The core exercises form the basis of the workshops. These exercises ensure that certain key concepts are emphasized ; similar information is gathered from each audit to establish comparative baselines ; awareness of gender issues in the work unit is generated ; and valuable information for the audit obtained.

The workshop's six core exercises comprise :

Core 1	Historical timeline
Core 2	Gender knowledge and awareness
Core 3	Classification of projects and activities
Core 4	Hofstede's onion/Organizational culture
Core 5	Perception of the achievement of change
Core 6	Learning about learning

The five optional exercises vary in length, complexity of execution and degree of information-generation.

A typical two-day audit workshop for management/technical staff does not allow for all optional exercises to be conducted. Therefore, their selection and use is left to the discretion of the gender audit facilitation team, and may be based on the need for additional information, the skills and preferences of the facilitators, or the time available in the workshop agenda.

The optional exercises include :

Optional 1	SWOT analysis
Optional 2	Venn diagram
Optional 3	Ideal organization
Optional 4	Mind mapping on decision-making
Optional 5	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, Core exercises 1 to 4 should be completed on the first day of the workshop ;
- Thereafter, facilitators can choose to use either one or two optional exercises. For example, a combination of either the SWOT analysis or mind mapping or gender quality questionnaire can be used with either the Venn diagram or ideal organization exercises. This combination would result in roughly three hours of the workshop agenda, and could be completed in the morning of the second day.
- Following the selection of the optional exercises, the workshop should be concluded with Core exercises 5 and 6 at the end of the second day.

The following sample agenda for management and technical staff illustrates the possible flow of a two-day workshop :

Day 1	
09:00 – 09:15	Introduction*
09:15 – 09:45	Core 1: Historical timeline
09:45 – 10:45	Core 2: Gender knowledge and awareness
10:45 – 11:00	Break
11:00 – 13:00	Core 3: Classification of projects and activities
13:00 – 14:00	Lunch
14:00 – 14:30	Core 3: Classification of projects and activities, continued
14:30 – 15:30	Core 4: Hofstede's onion/Organizational culture
15:30 – 15:45	Break
15:45 – 16:45	Core 4: Hofstede's onion/Organizational culture, continued
16:45 – 17:15	Participants fill out the gender quality questionnaire if this optional exercise has been chosen for the following morning

Day 2	
09:00 – 09:15	Recap of previous day and Introduction of Day 2
09:15 – 10:45	Optional exercise (e.g., Venn diagram or ideal organization)
10:45 – 11:00	Break
11:00 – 13:00	Optional exercise (e.g., SWOT or mind mapping or gender equality questionnaire)
13:00 – 14:00	Lunch
14:00 – 15:45	Core 5: Perception of the achievement of change
15:45 – 16:00	Break
16:00 – 16:45	Core 5: Perception of the achievement of change, continued
16:45 – 17:15	Core 6: Learning about learning
17:15 – 17:30	Conclusions/Closing

*The initial introduction does not have to be lengthy. The audit facilitation team should have already met the work unit staff to introduce the audit. In addition, most staff members will have been interviewed as well, so participants should be familiar with the purpose of the audit.

Workshops and exercises for the different target groups

Three separate workshops are organized for support staff, senior managers and management/technical staff, and partner organizations:

- A half-day workshop is organized for all support staff who should be encouraged and allowed to express their views freely without feeling constrained by the presence of supervisors and managers;
- A maximum of two full days, or a minimum of one and a half days, is reserved for the workshop for management/technical staff;
- A half-day workshop is usually sufficient for the workshop for partner organizations, which focuses only on their views and perceptions of the audited units in relation to the work items in which they are collectively engaged.

The organizational principles are the same for all workshops, but the exercises vary with the target group. The logistical readiness and task sharing principles apply to all the workshops although the exercises used vary according to the target group. All core exercises should be conducted during the workshops for management/technical staff and optional exercises conducted if time permits. A mix of core and optional exercises can be conducted for support staff and partner organizations.

The table below suggests how these may be used with the three target groups.

Management/technical staff	Support staff	Partner organizations
Historical timeline	Historical timeline	
Gender knowledge and awareness	Gender knowledge and awareness	
Classification of projects/activities		
Hofstede's onion	Hofstede's onion	
Swot		
Venn diagram		
Ideal organization	Ideal organization	
Mind mapping		
Gender quality questionnaire		
Perception of the achievement of change		Perception of achievement on gender equality
Learning about learning	Learning about learning	

Core exercise 1 : Historical timeline

This core exercise illustrates and underpins the audit findings and recommendations.



The groundwork

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 (A).
- Mainstreaming of gender equality as a cross-cutting concern in the organization's strategic objectives, programme and budget (B).
- Mainstreaming of gender equality in the implementation of programmes and technical cooperation activities (C).
- Existing gender expertise and competence and capacity building (D).
- Information and knowledge management (E).
- Systems and instruments in use such as planning/monitoring, human resources development, and communication (F).
- Choice of partner organizations (G).
- Gender equality policy as reflected in the organization's products and public image (H).
- Decision-making on gender mainstreaming in the organization's (I) staffing and human resources (J).
- Organizational culture (K).
- Perception of achievement on gender equality (L).

Suggested time

Initially half an hour or less, then continuing over the two weeks of the audit.

Method

- Group reflection on historical factors related to gender/women/men in the organization's programme, such as meetings, people and documents. These are placed in chronological order on a timeline.
- The timeline is pinned to the wall for the duration of the workshop and participants continually add information.

Preparation

- The organization's historical timeline can be constructed by photocopying and adapting the ILO's timeline (see below), and by pinning it to the wall.
- 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.

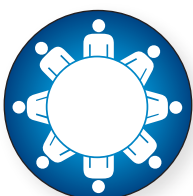
Sample flip chart	Suggested materials
<p>Historical Timeline Exercise</p> <p>Goal: Create a historical timeline of the work unit's implementation of the organization's gender policy, including milestones such as gender-related events or publications.</p> <p>How: As historical milestones are identified, participants add them to the historical timeline on the wall in the facilitated workshop areas.</p> <p>Time: Initially half an hour and then continuing over the two weeks of the audit.</p>	<ul style="list-style-type: none"> • Long roll of paper or several sheets of flip chart paper joined together and taped to a wall. • ILO timeline photocopied and pasted together per instructions. • Small cards for writing down milestones. Alternatively, they can be written directly on the paper. • Marker pens. • Flip chart entitled "What we have learned" to use at the end of the exercise.

During the exercise



Plenary

- Remind participants of the goal of this exercise at the start of the session : to create a historical timeline of the work unit's implementation of their organization's gender policy, including milestones such as gender-related events or publications.
- This exercise is good for warming up participants and helping to break the ice 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.
- Depending on the level of information available in the group, it is sometimes possible to make a mirror timeline that compares developments at the organizational level with those of the individual work unit and/or the unit's programmes and projects.



Small groups

A practical tip



- Often participants have 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 can also suggest 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.

Example : Historical timeline on women and gender at the ILO

(Note: International events are highlighted in **red** in the table.)

Method

- Photocopy the pages of the timeline. Cut out the timeline strips. Match up the blue date bands and paste the strips together.
- This will form a timeline going from 1919 to 2005, which you can tack to the wall above the timeline that the work unit creates during the Gender Audit Workshop.

		Convention No. 100 Equal Remuneration
Convention No. 3 Maternity Protection		Recommendation No. 90 Equal Remuneration
1919	1948	1951
	Convention No. 89 Night Work (Women), (Revised)	



	Convention No. 111 Discrimination (Employment and Occupation)	
	Recommendation No. 111 Discrimination (Employment and Occupation)	
1952	1958	1964
Convention No. 103 Maternity Protection (Revised)		Convention No. 122 Employment Policy (Article 1 (2c))
Recommendation No. 95 Maternity Protection		Recommendation No. 122 Employment Policy



Convention No. 140 Paid Educational Leave (Article 8 and 9(a))	Beginning of the International Women's Decade (ended in 1985)	Establishment of the ILO Office for Women Workers' Questions (FEMMES)
1974	1975	1976
	Convention No. 142 Human Resources Development (Article 1(5)) Recommendation No. 150 Human Resources Development (VIII. Promotion of Equality of Opportunity of Women and Men in Training and Employment) First World Conference on Women Mexico City International Year of the Woman	



	Second World Conference on Women Copenhagen	
1979	1980	1981
UN Convention on the Elimination of All Forms of Discrimination Against Women – CEDAW (came into force on 3 September 1981)		Convention No. 156 Workers with Family Responsibilities Recommendation No. 165 Workers with Family Responsibilities



<p>“Women Workers” is one of the six global themes of the ILO programme (as defined in the Mid-Term Plan 1982-1987)</p>		<p>Third World Conference on Women Nairobi</p> <p>Resolution on Equal Opportunities and Equal Treatment for Men and Women in Employment (71st Session of the International Labour Conference)</p>
1982	1984	1985
	<p>Recommendation No. 169 Employment Policy (Supplementary Provisions)</p>	



	<p>Convention No. 171 Night Work</p> <p>Recommendation No. 178 Night Work</p>	
1987	1990	1995
<p>Office-wide Plan for Action on Equality of Development – Opportunity and Treatment of Men and Women in Employment endorsed by ILO Governing Body</p>		<p>World Summit for Social Development Copenhagen</p> <p>Fourth World Conference on Women Beijing</p> <p>Development and approval of the ILO Action Plan on Gender Mainstreaming for Gender Equality</p>



ILO Inter-regional Consultation Meeting on Gender Mainstreaming		Convention No. 183 Maternity Protection (Revised) Symposium on Decent Work for Women
1998	1999	2000
	<p>Establishment of the Bureau for Gender Equality reporting directly to the Director-General</p> <p>Director-General Circular on Gender Mainstreaming (Circular no. 564)</p> <p>First Strategy Development Workshop on the ILO Action Plan on Gender Mainstreaming (Turin)</p> <p>Optional Protocol to the UN Convention on the Elimination of All Forms of Discrimination against Women – CEDAW</p> <p>Convention No. 182 Worst Forms of Child Labour</p> <p>Gender Equality and Development are identified as cross-cutting issues in the Programme and Budget</p> <p>Inter-regional Consultation Meeting on Gender Mainstreaming (Turin)</p> <p>Youth, Women, Conflict: A celebration of International Women's Day</p>	<p>Establishment of task teams working on the implications of Gender Mainstreaming for the ILO</p> <p>World Summit for Social Development Geneva (Copenhagen+5)</p> <p>Twenty-third Special Session of the UN General Assembly New York (Beijing+5)</p>



2001	2002	2003
<p>Inter-regional Consultation Meeting on Gender Mainstreaming (Turin)</p> <p>First ILO Gender Audit</p>		<p>Inter-regional Consultation Meeting on Gender Mainstreaming (Turin and Geneva)</p> <p>International Women's Day Event on Dangerous Assignments: Women Covering Conflict</p>



2004	2005	2006
Gender is one of the six shared policy objectives of the ILO Programme and Budget		Gender is one of the five mainstreamed strategies in the ILO Programme and Budget (2006-2007)
Resolution concerning the promotion of gender equality, pay equity and maternity protection, 2004		



Core exercise 2: Gender knowledge and awareness: How much does the staff know about gender-related concepts?

This core exercise is an excellent way to encourage gender audit workshop participants to reflect and analyse experience-based knowledge and awareness. Participants pass through the first three stages of the adult learning cycle and the fourth stage if a future perspective is taken (see Part One: An overview of the PGA methodology).



The groundwork

We'll find out about:

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

Suggested time

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

Method

- Facilitators create cards upon which they write one gender-related concept per card. They place the cards in a container.
- Participants choose a card from the container and read out the concept written on it. After they explain their interpretation of the concept to the group, other participants add to the definition, modify it and/or comment on the concept's importance.

OR

- Participants each choose a 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.

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
<p>Gender Knowledge and Awareness Exercise</p> <p>Goal : Assess if the work unit staff has a shared understanding of gender-related concepts.</p> <p>How : Explain and discuss gender-related concepts.</p> <p>Time : One or two hours (the facilitation team should decide the length of the exercise).</p>	<ul style="list-style-type: none"> • Cards with gender-related concepts written on them. • Container. • Flip chart entitled “What we have learned” to use at the end of the exercise.



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 fun – the atmosphere should be animated and should not resemble an examination.

Core exercise 3: Classification of projects and activities

Facilitators have found this exercise to be one of the most useful and best received since it is directly related to work experience and the application of gender concepts.



The groundwork

We'll find out about:

- Mainstreaming gender equality in the implementation of programmes and technical cooperation activities (C).
- Perceptions of achievement on gender equality (L).
- Mainstreaming gender equality as a cross-cutting concern in the organization's strategic objectives, and programme and budget (B).
- Choice of partner organizations (G).
- The organization's gender equality policy as reflected in its products and public image (H).

Suggested time

Two and a half hours.

Method

Participants classify the gender approach of their activity or project.

Preparation

Prepare flip charts and make copies of handouts (see following pages).

Sample flip chart	Suggested materials
<p>Classification of Projects and Activities Exercise</p> <p>Goal: Reflect on how different types of activities/projects can contribute to promoting gender equality.</p> <p>How: Classify projects/activities by beneficiaries, type of organization and gender perspective.</p> <p>Time: Two and a half hours.</p>	<ul style="list-style-type: none">• Four flip charts prepared in advance which reproduce the four tables provided below.• Markers.• Tape.• Handouts.• Flip chart entitled "What we have learned" to use at the end of the exercise.

During the exercise



Plenary



Small groups

- Remind participants of the goal of this exercise: to learn why and how projects or activities can contribute to greater gender equality, and to what extent this is linked to their target group and chosen approach.
- This exercise should be closely facilitated. Participants cannot perform it by themselves and should be led step-by-step through the analysis. For this reason a detailed four-step facilitation process is provided on the following pages.
- Define what is meant by an “activity” and/or a “project” within the organization’s context.
- Remind participants to reflect on the current reality in their project/ activity – not the intended outcome.
- Lead participants through the four steps of the classification exercise. Note: The questions in step four can be discussed in small groups or in plenary, depending on the available time. If participants have limited gender awareness, step four is best carried out in plenary.
- Divide participants into small groups for work on the four steps of the classification exercise, if possible by project or activity.
- Bring participants back together in plenary to present and discuss their findings.

Four steps for classification of projects and activities

Step One: Project/activity classification (Suggested time: 30 minutes)

- Distribute handout on gender perspectives for project/activity classification (see below).
- Participants discuss what type of problem analysis (needs analysis, stakeholder analysis, etc.) was conducted prior to formulating their project/activity.
- Participants consider whether these helped to bring out gender dimensions of the problems to be addressed, and if not, why not.
- Participants discuss whether their project/activity is mainly providing direct support to beneficiaries (for example home-workers) or to institution building for partner organizations and implementing partners (for example, in the case of the ILO, workers’ or employers’ organizations or a labour ministry or other government institution). The same project or activity may target both beneficiaries and partner organizations.
- Participants fill in the flip chart for Table One below and present it in plenary.

Table One : Project/activity classification		
	Direct support to beneficiaries	Institution building for partner organizations and implementing partners
Project/activity A		
Project/activity B		
Project/activity C		
Project/activity D		

Step Two : Classification of beneficiaries and institution building (Suggested time : 20 minutes, followed by a short break or lunch)

- Participants discuss their project/activity.
- If it is direct support to beneficiaries, they should determine whether it is mainly directed at women's groups, men's groups, or mixed groups.
- If it is aimed at institution building, they should determine whether the organization strengthened by the project or activity works mainly with women's groups, men's groups, mixed groups or other organizations such as NGOs.
- Participants enter their conclusions into Tables Two A and Two B and present the results in plenary.

Table Two A : Classification of beneficiaries			
	Predominantly targets women	Predominantly targets men	Targets mixed groups
Project/activity A			
Project/activity B			
Project/activity C			
Project/activity D			

Table Two B : Classification of beneficiaries			
	Works with/for women's groups	Works with/for men's groups	Works with/for mixed groups
Project/activity A			
Project/activity B			
Project/activity C			
Project/activity D			

Step Three : Classification project/activity (Suggested time : 20 minutes)

- Participants refer back to the handout on gender perspectives for project/activity classification (see below pp.61-2).
- They choose the perspective that best reflects the gender dimension of the project/activity and explain why.

Table Three : Classification of project/activity				
	Gender-blind	Gender-specific		Mainstreaming
		Empowering women and girls	Focusing on men and boys	
Project/activity A				
Project/activity B				
Project/activity C				
Project/activity D				

Step Four: Perspective and gender relations – change and improvement
(Suggested time : 40 minutes)

- Participants discuss how gender relations have been affected because of the perspective of their project or activity.
- Participants discuss whether or not the project or activity contributes to fulfilling practical gender needs or to realizing strategic gender interests.
- Participants discuss possibilities for changes in perspective and improvement of project performance on gender equality and women's empowerment.

GENDER PERSPECTIVES FOR PROJECT/ACTIVITY AND ORGANIZATION CLASSIFICATION

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

Within the ILO context, 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.

Core exercise 4: Hofstede's onion / Organizational culture



The groundwork

We'll find out about:

- Organizational culture (K).
- Existing gender expertise and competence and capacity building (D).
- Perception of achievement on gender equality (L).
- Staffing and human resources (J).
- Information and knowledge management (E).

Suggested time

Two hours.

Method

Using an onion as a metaphor for the organization:

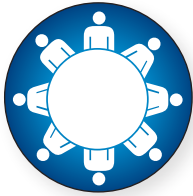
- Participants “peel away” layers of the work unit to reach the core – the organizational culture.
- Participants then identify the aspects of this organizational culture that promote or hinder gender equality and women's empowerment within it.
- This approach is especially effective with support staff,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

Preparation

Keep the exercise local 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/heroiners”, and “norms” and “values” mean.
- Prepare cards and flip chart.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
<p>Organizational Culture Exercise</p> <p>Goal: Identify the work unit's culture vis-à-vis gender equality.</p> <p>How: Peel away layers of an imaginary onion to discover how and why the work unit functions the way it does.</p> <p>Time: Two hours.</p>	<ul style="list-style-type: none">• Four flip charts with large onion (see example on page 65).• Small cards. Differentiate the four layers of the organizational culture by using four different coloured cards or by marking the corners of white cards with four different colours or by writing comments in four different colours.• Markers.• Tape.• Flip chart entitled “What we have learned” to use at the end of the exercise.



Small groups



Plenary

During the exercise:

- Create an ambience of trust. Remember that organizational culture issues can be sensitive.
- Divide participants into small groups – if possible sharing similar tasks or responsibilities.
- 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.
- Discuss and write down on cards the symbols/artefacts, champions/heroiners/heroes, rituals and values of the work unit. Place these on the appropriate layer of the onion (see definitions and discussion questions below). Suggested time: 45 minutes followed by a 15-minute break.
- Bring participants back together in plenary to discuss the total image of the organization that emerges from this exercise. Suggested time: 1 hour.

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?

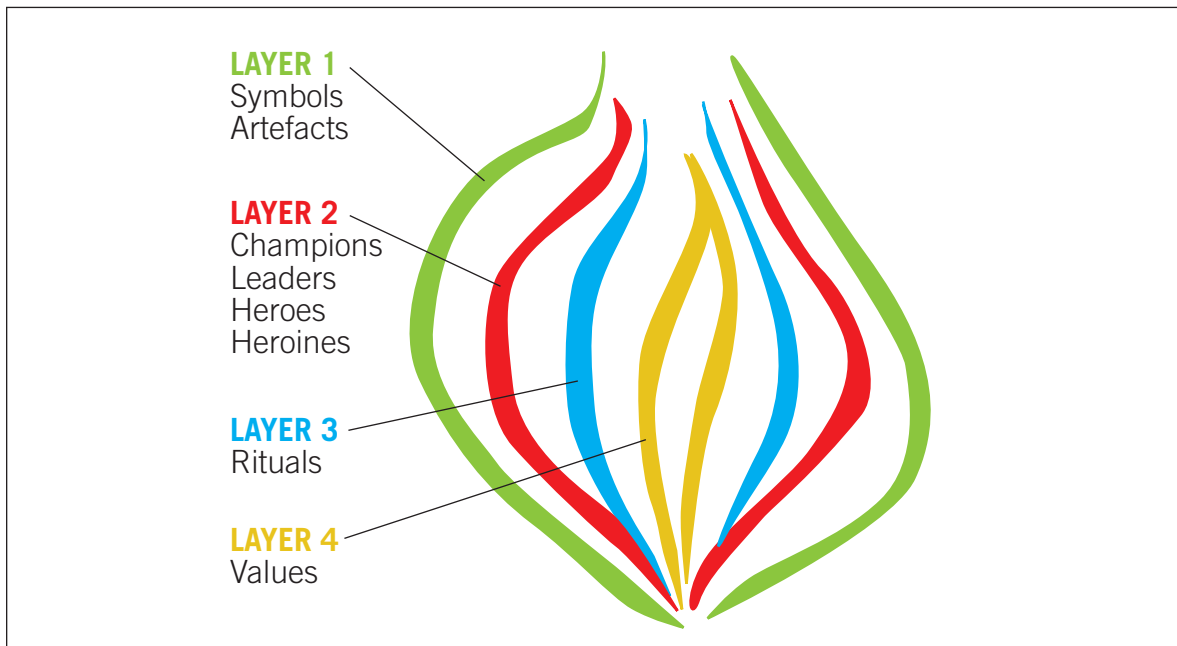
Other questions that can be used concerning effecting change of the work unit's organizational culture include:

- 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



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 and 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: endless – or no – coffee 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?

Optional exercise 1 : 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 (A).
- Mainstreaming of gender equality as a cross-cutting concern in the organization's strategic objectives, programme and budget (B).
- Mainstreaming of gender equality in the implementation of programmes and technical cooperation activities (C).
- Existing gender expertise, competence and capacity building (D).
- The organization's gender equality policy as reflected in its products and public image (H).
- Information and knowledge management (E).

Suggested time

Two to three hours.

Method

SWOT analysis provides a framework of four elements that reflect a work unit's strengths, weaknesses, opportunities and threats.

Preparation

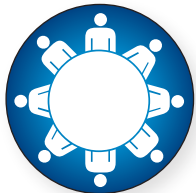
- Prepare flip charts with the SWOT analysis on page 69.
- Prepare copies of the organizational analysis checklist and the SWOT matrix below.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
<p>SWOT Analysis Exercise</p> <p>Goal: Assess strengths, weaknesses of the organization/work unit from a gender perspective and identify opportunities and constraints.</p> <p>How: Using an organizational analysis checklist, analyse project strengths and weaknesses and identify opportunities and constraints.</p> <p>Time: Two to three hours.</p>	<ul style="list-style-type: none"> • 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.

During the exercise



Plenary



Small groups

- Conduct the exercise in plenary or in small groups followed by discussion in plenary.
- Participants use the Organizational analysis checklist to analyse 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”).
- 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.

SWOT ANALYSIS	
<p>STRENGTHS</p> <p>Describe the strengths of the work unit. Consider the following factors:</p> <ul style="list-style-type: none"> • Comparative advantage • Resources <p>Ask the following questions:</p> <ul style="list-style-type: none"> • What are our advantages? • What do we do well? 	<p>WEAKNESSES</p> <p>Describe the weaknesses of the work unit. Consider the following factors:</p> <ul style="list-style-type: none"> • Achilles heel • Disadvantages • Resource and capability shortfall <p>Ask the following questions:</p> <ul style="list-style-type: none"> • What could be improved? • For what are we unprepared? • What should be avoided?
<p>OPPORTUNITIES</p> <p>Describe what opportunities your work unit could explore to capitalize on situations such as these:</p> <ul style="list-style-type: none"> • 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 <p>Ask the following questions:</p> <ul style="list-style-type: none"> • What are the interesting trends? • What are the best opportunities to act on? 	<p>THREATS</p> <p>Describe the threats that might prevent your work unit achieving its objectives. Consider these factors:</p> <ul style="list-style-type: none"> • 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 <p>Ask the following questions:</p> <ul style="list-style-type: none"> • What obstacles do we face? • What is our “competition” doing?

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

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.

Optional exercise 2: Venn diagram – Are the work unit's internal and external stakeholders 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 (A).
- Existing gender expertise and competence and capacity building (D).
- Choice of partner organizations (G).
- The organization's gender quality policy as reflected in its products and its public image (H).

Suggested time

One and a half hours.

Method

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

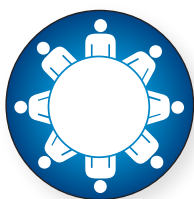
Preparation

- 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
<p>Venn Diagram Exercise</p> <p>Goal: Identify and analyse internal and external stakeholders in organization/work unit/project vis-à-vis promoting gender equality.</p> <p>How: Participants create a diagram illustrating stakeholders.</p> <p>Time: One and a half hours.</p>	<ul style="list-style-type: none"> • Flip charts. • Markers. • Flip chart entitled “What we have learned” to use at the end of the exercise.

During the exercise

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



Small groups

Step One: Identifying the work unit's stakeholders and assessing their importance (Suggested time: 15 minutes)

- List all of the organization's work units and external organizations (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 (Suggested time: 15 minutes)

- 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 (Suggested time: 15 minutes)

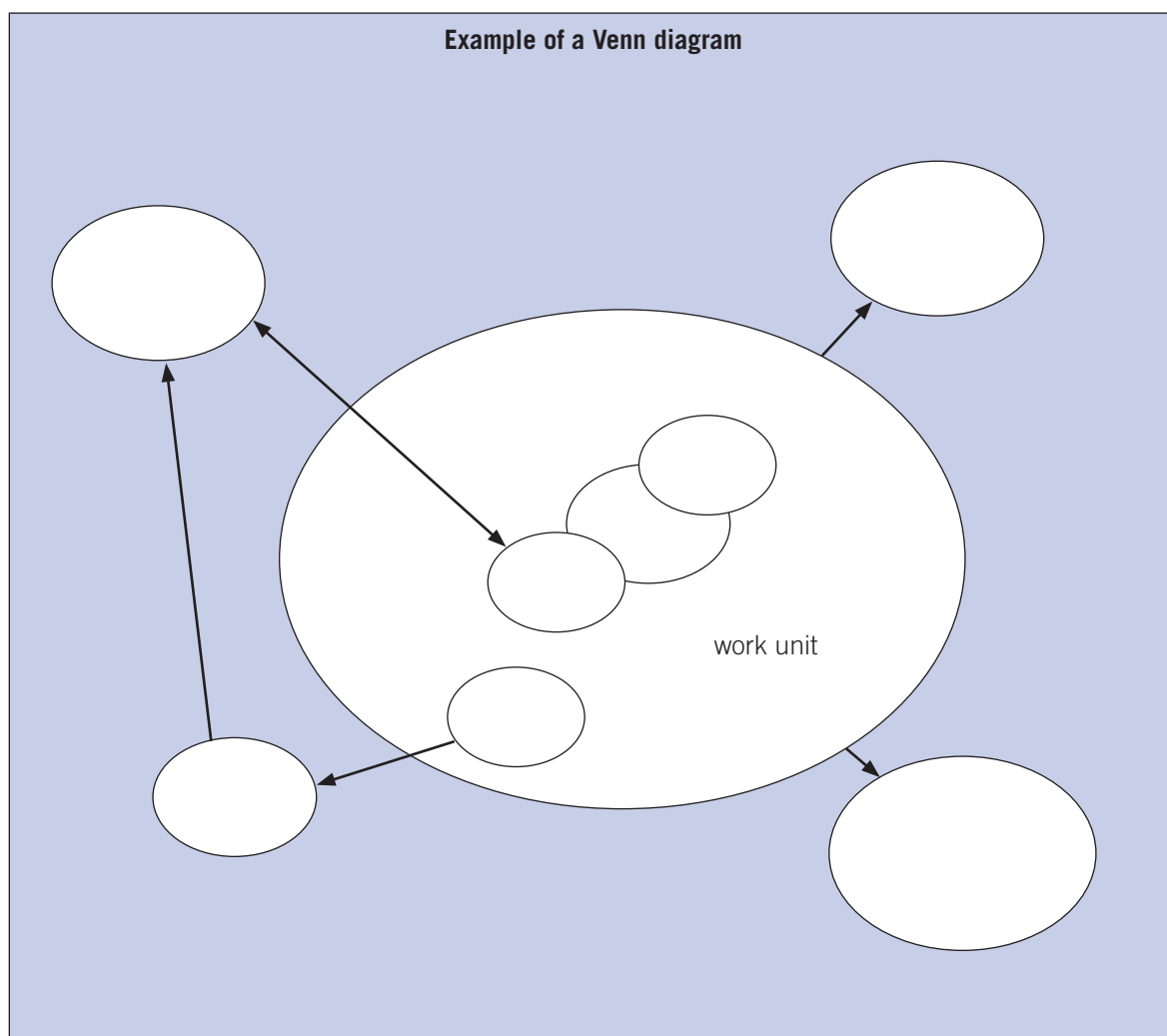
- Participants discuss the units and organizations in relation to gender quality.
- They draw a red line between their unit's circle and that of an organization or other unit if they consider that the relationship is driven or influenced by gender equality.
- They draw lines with arrows indicating the 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.

Step Four: Deciding how this network can promote gender equality? (Suggested time : 45 minutes)



Plenary

- 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.



Optional exercise 3: Ideal organization



The groundwork

We'll find out about:

- Organizational culture (K).
- Existing gender expertise and competence and capacity building (D).
- Perception of achievement on gender equality (L).
- Staffing and human resources (J).
- Information and knowledge management (E).

Suggested time

One and a half hours.

Method

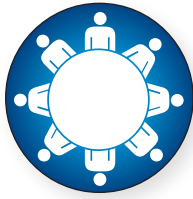
Guided discussion, in small groups and then in plenary, that leads to the development of a vision about the ideal organization and how its work could mainstream gender and promote gender equality. This exercise usually lends itself to use with management/technical staff.

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.
- Pin large sheets of paper to the wall (or use a flip chart) on which participants' ideas are written. Suggested headings per sheet could be: "ideals", "personal benefits and contributions", "actual situation", "improvements".

SAMPLE FLIP CHART	SUGGESTED MATERIALS
<p>Ideal Organization Exercise</p> <p>Goal: Develop together a vision of the ideal organization and/or work unit in which gender equality is a reality.</p> <p>How: Discuss how such an organization/work unit would mainstream gender.</p> <p>Time: One and a half hours.</p>	<ul style="list-style-type: none">• Handout with lists of questions.• Long sheet of paper or flip charts.• Markers.• Tape.• Flip chart entitled "What we have learned" to use at the end of the exercise.

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



Small groups



Plenary

- Divide into small groups and ask participants to discuss the questions in the handout. Suggested time: 30 minutes.
- In plenary, a representative of each small group presents their conclusions. Suggested time: 30 minutes.
- Following the small group presentations, participants discuss the conclusions and prioritize the most important differences identified between the ideal situation and the current reality. Plenary discussion should then focus on the concrete proposals for improvement. Suggested time: 30 minutes.
- With a small number of participants, discuss the ideal organization/unit. 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. Suggested time: 1 hour and 30 minutes.
- Encourage free thinking by asking participants not to make judgements about others' views during the brainstorming and posing 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 organization 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 organization, what would you expect or hope to get out of it?

- In what way would your personal vision come to fruition?
- How could you contribute to the ideal organization?

Does your work unit have some of the described characteristics?

- If so, which characteristics does it have?
- Which characteristics does it not have?
- Of the characteristics it does not have, which one do you find to be the most important?
- What are some practical ideas for incorporating these characteristics into the work unit?

Optional exercise 4: Mind mapping on decision-making: Why decisions concerning gender mainstreaming have or have not been made



The groundwork

We'll find out about:

- Decision-making on gender mainstreaming in the organization (I).
- Organizational culture (K).
- Existing gender expertise and competence and capacity building (D).
- Gender equality policy as reflected in products and the organization's public image (H).

Suggested time

Two hours.

Method

Using the image of the mind map, an inventory is made of the types of decision or responsibilities concerning gender equality that are taken and assigned in a country, regional or sector programme.

Preparation

- Facilitators should know from the desk review of the work unit what decisions have been made concerning gender mainstreaming in the programme. These can be used to start the exercise by giving some examples from the programme and context.
- If available, post the historical timeline in the room to prompt ideas.
- Prepare a flip chart of the mind mapping diagram below with "gender equality decisions" written in the middle.

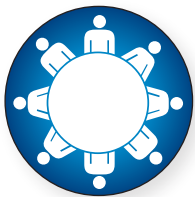
SAMPLE FLIP CHART	SUGGESTED MATERIALS
<p>Mind Mapping on Decision-making Exercise</p> <p>Goal: Understand why decisions concerning gender mainstreaming have – or have not – been taken.</p> <p>How: Make an inventory of decision or responsibilities concerning gender equality in the sector.</p> <p>Time: Two hours.</p>	<ul style="list-style-type: none"> • Flip chart. • Markers. • Flip chart entitled "What we have learned" to use at the end of the exercise.



Plenary

During the exercise

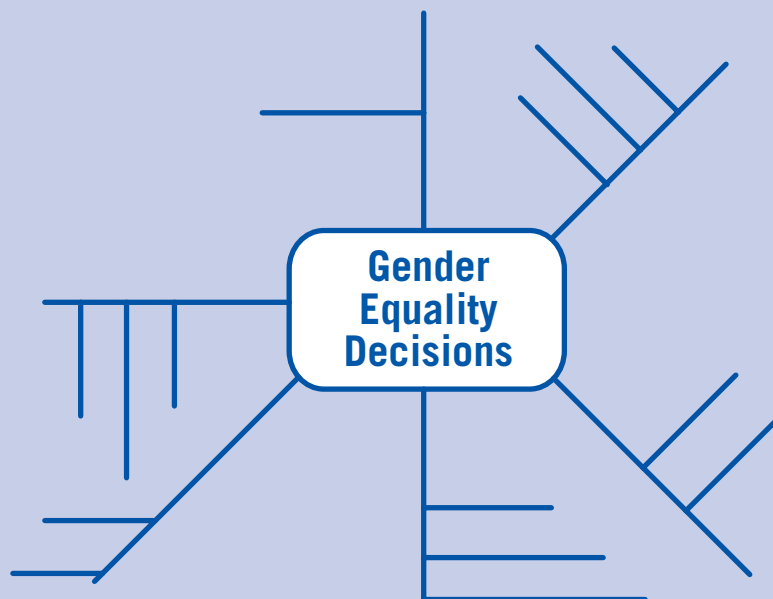
Remind the participants of the goal of this exercise: (1) to help participants trace the history of the work unit's implementation of its gender policy and see the interconnections between decisions made and their actual implementation; and (2) to help them see what types of decisions should be taken – or responsibilities assumed – in order to promote gender equality in the future. The mind map provides a way of analysing the past and looking towards the future. The desk review and historical timeline provides the background for this exercise.



Small groups

- The image of the mind map aims to trigger other layers of thought. Invite participants to use drawings as well as text during this exercise.
- Conduct the exercise in small groups or plenary. In the case of small groups, ask each participant to draw their own mind map and share these later in plenary.
- Include a historical perspective if there are “veterans” in the group who can start the exercise by recalling decisions taken in the past, including at project, sector, regional and national levels.
- It is important to look at some cause-and-effect situations. Participants choose the most important decision and draw a chart of its development. It is also possible to use the mind map to plan decisions that have to be taken in future. Participants pass through the first three stages of the adult learning cycle and the fourth stage, if a future perspective is taken (see Part One: An overview of the PGA methodology).

Sample Mind-Mapping Diagram



Step One: Identifying the main types of decisions/choices taken by the work unit regarding gender equality (Suggested time: 30 minutes)

If the exercise is conducted in plenary:

- Participants identify the main types of decisions/choices that the work unit has made in the past concerning gender equality.
- For each main type of decision/choice, the facilitator draws a line radiating from the centre of the diagram and writes the decision/choice on it or represents the decision/choice by a symbol.

If the exercise is conducted in small groups:

- Participants identify the decisions/choices through group discussion and individuals draw their own diagrams.

Step Two: Identifying smaller decisions, which enable the main decisions to be taken (Suggested time: 30 minutes)

- For each of the main radial lines, participants are asked to think of smaller, more detailed decisions and/or responsibilities that have to be taken to enable the main decision and/or choice to be made.
- These details are then written on smaller lines, which emanate from the main radial lines.

Step Three: Identifying who takes the decisions (Suggested time: 20 minutes)

- For each of the decisions and/or responsibilities (starting with the smaller ones), participants identify who takes the decision and in cooperation with whom.

Step Four: Discussing the issues brought forth by the diagram (Suggested time: 40 minutes)

- When the diagram is complete, participants discuss the image and the resulting issues and/or observations that can be made about it.
- If the exercise is done using a perspective that focuses on the future, the questions can be related to the commitment necessary to fulfil the required responsibilities.

SAMPLE DISCUSSION QUESTIONS FOR STEP FOUR

- Are the decisions/responsibilities equally divided over the organization and the staff involved?
- Are decision-making and other responsibilities distributed in such a way that the objectives of gender equality and women's empowerment are fulfilled?
- Are the decisions taken shared with all the people/organizations involved?
- Which types of decisions or responsibilities were not taken or not implemented?

Optional exercise 5: Gender quality questionnaire: What is the quality of the unit's implementation of the organization's gender policy?



The groundwork

We'll find out about:

- Mainstreaming of gender equality as a cross-cutting concern in the unit's strategic objectives, and programme and budget (B).
- Mainstreaming of gender equality in the implementation of the unit's programmes and technical cooperation activities (C).
- Existing gender expertise and competence and capacity building (D).
- The organization's gender equality policy as reflected in the work unit's products and public image (H).
- Staffing and human resources (J).
- Perception of achievement on gender equality (L).
- Organizational culture (K).
- Information and knowledge management (E).
- Systems and instruments in use such as planning/monitoring, human resources development and communication (F).
- Choice of partner organizations (G).

Suggested time

Half an hour to fill out the questionnaire on the previous afternoon and two hours to conduct the exercise.

Method

- Distribute the self-assessment questionnaire on page 84 at the end of Day 1 of the workshop for each participant to fill out before leaving. The questionnaire focuses on the competence of both individual participants and the work unit as a whole vis-à-vis gender issues and mainstreaming.
- Tabulate and use it during the morning of Day 2.
- 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 a thorough understanding of the programme of the work unit before conducting the exercise, which is achieved by completing the document review and through the one-on-one interviews.
- 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 questions	X	Number of participants	=	100%*
*The results of the scoring should be presented in a graph. Facilitators familiar with Microsoft Excel may choose to construct this graph electronically.							

SAMPLE FLIP CHART	SUGGESTED MATERIALS
<p>Gender Quality Questionnaire Exercise</p> <p>Goal : Reflect on and discuss the quality of the work unit's gender mainstreaming, reaching a consensus, if possible.</p> <p>How : Participants complete an anonymous questionnaire and then discuss the results in plenary.</p> <p>Time : A half hour for filling out the questionnaire on the previous afternoon and two hours for conducting the exercise.</p>	<ul style="list-style-type: none"> • Scoring sheet. Calculator. • Flip chart for the quality graph. • Two markers of different colours. Copies of the questionnaire.



Plenary

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.



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 : Filling out the questionnaire (Suggested time : 30 minutes)

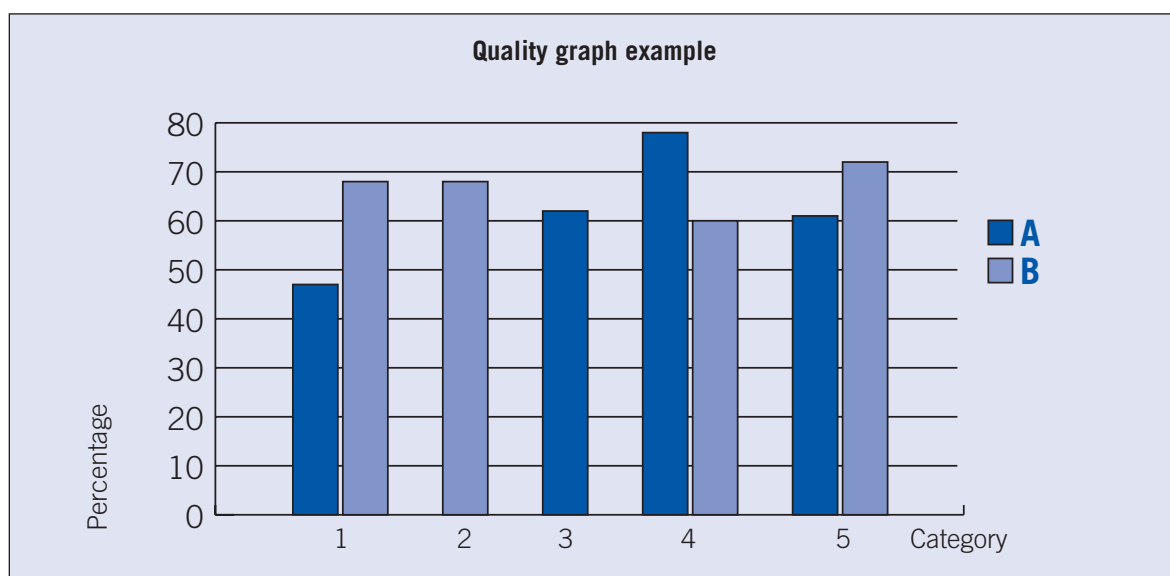
- Participants anonymously fill out the questionnaire on Day 1 and return it to the facilitators for processing and use on Day 2.
- The two aspects of quality considered in the questionnaire are personal and organizational (see *Gender quality questionnaire* on page 84).

- 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 (Suggested time : 1-2 hours of facilitators' time in the evening of Day 1)

- 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.

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



Step Three : Plenary discussion (Suggested time : 2 hours)

1. Summarize the scores and encourage discussion. Initial questions can include :

- 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)

2. Focus discussion on the meaning of the scores. Questions can include :

- Why are they high or low?
- Are the participants content with their scores?
- Do the scores indicate that they are competent enough in this domain and that the organization is competent enough?
- What have they already done to improve their capability?

During the discussion, a good approach with participants is to ask them to write down the gender policy of their work unit in five sentences. Then ask them to compare their descriptions with their organization's gender policy. This often helps to reveal differences in perceptions. (Suggested time : 45 minutes)

3. Focus discussion on opportunities for improvement at the individual, team and organizational levels. 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. (Suggested time : 45 minutes)

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	
------------------------	--	--------------------------	--	----------------------------	--	------------------------	--

1A.2 How well informed are you about the content of the organization's gender policy? For example, have you read the relevant documents?

3 Completely		2 Sufficiently		1 Insufficiently		0 Not at all	
------------------------	--	--------------------------	--	----------------------------	--	------------------------	--

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

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

Score: _____

B. Organizational aspects

These questions seek to elicit the extent to which the organization's gender policy has been translated into area, regional or sectoral gender policy, and identify the documents providing evidence of this.

1B.1 How well does the organization operationalize its gender policy in its area/regional/sectoral programme(s)?

3 More than sufficiently		2 Sufficiently		1 Insufficiently		0 Not at all	
------------------------------------	--	--------------------------	--	----------------------------	--	------------------------	--

1B.2 How important do you think your work unit considers 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 organization inform you about the content of its gender policy at area, region, sector or headquarters level? For example, have you been encouraged to read the relevant documents?

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 organization has sufficient tools, methods and procedures to allow for practical implementation of its gender policy.

2.1 Are the organization's gender policy and action plan updated regularly by the organization? How often?

3 Frequently		2 Often enough		1 Seldom		0 Not at all	
------------------------	--	--------------------------	--	--------------------	--	------------------------	--

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

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

2.3 Does your 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 arrangements been made to allow for the free flow and exchange of information and experiences within and between country programmes, regions and sectors? If so, how adequate are these?

3 Completely		2 Sufficiently adequate		1 Inadequate		0 No arrange- ments have been made	
------------------------	--	--------------------------------------	--	------------------------	--	--	--

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

3 Very well		2 Sufficiently		1 Insufficiently		0 Not at all	
-----------------------	--	--------------------------	--	----------------------------	--	------------------------	--

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 Sufficiently often		1 Yes, but only occasionally		0 No, not at all	
-------------------------	--	-----------------------------------	--	---	--	----------------------------	--

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 your organization 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

The organization sees gender equality as a cross-cutting issue. This means that staff members 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	
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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 approach used)?

3 Always		2 Usually		1 Seldom		0 Never	
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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 organization contributes to how and what work is accomplished. Guided by the following questions, assess how you personally contribute to the organizational culture, how the organization deals 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?

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

3 Yes, more than enough		2 Yes, enough		1 No, not enough		0 No, nothing at all	
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4B.2 Does your work unit have an active policy to promote gender equality and respect for diversity in decision-making, behaviour, work ethos and information? If so, how would you rate its effectiveness?

3 Excellent		2 Sufficient		1 Insufficient		0 No such policy	
-----------------------	--	------------------------	--	--------------------------	--	----------------------------	--

4B.3 Does your work unit have a sufficient policy to prevent and deal with harassment in the workplace? If so, how would you rate its effectiveness?

3 Excellent		2 Sufficient		1 Insufficient		0 No such policy	
-----------------------	--	------------------------	--	--------------------------	--	----------------------------	--

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 organization give orientation on including representative women-specific structures as contributors to activities?

3 Always		2 Often		1 Seldom		0 Never	
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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: _____

Core exercise 5: Perception of the achievement of change



The groundwork

We'll find out about:

- Perception of achievement on gender equality (L).
- Mainstreaming of gender equality in the implementation of programmes and technical cooperation activities (C).
- Mainstreaming of gender equality as a cross-cutting concern in the organization's strategic objectives, and programme and budget (B).
- Current gender issues, gender debate and the organization's relationship with national gender machineries and women's organizations within the framework of the work unit's programme (A).
- The organization's gender equality policy as reflected in its products and public image (H).
- Systems and instruments in use including planning/monitoring, human resources development, communication (F).
- Choice of partner organizations (G).
- Information and knowledge management (E).

Suggested time

Two and a half hours.

Method

- Conduct this exercise through group discussion based on semi-structured questions.
- Ask participants to make links between the context in which the work unit operates and its activities, as well as staff members' perception of the results of their proposals for improvement.
- Because it draws on work that the unit has performed over time, this exercise can be linked to the development of an historical timeline.
- Use the exercise to check the perceptions that partner organizations have of the work unit's performance on gender equality goals.

Preparation

- Prepare semi-structured questions for group work in advance.
- Base general questions concerning the main areas of achievement on texts in the document review and on the preliminary discussions with programme staff in the work unit.

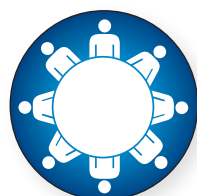
SAMPLE FLIP CHART	SUGGESTED MATERIALS
<p>Perception of the Achievement of Change Exercise</p> <p>Goal: Construct a profile of the achievements of the work unit in gender equality.</p> <p>How: Making links between the context in which the work unit operates, its activities, perception of results, and proposals for improvement.</p> <p>Time: Two and a half hours.</p>	<ul style="list-style-type: none"> • Flip charts. • Markers. • Cards of four different colours. • Flip chart entitled “What we have learned” to use at the end of the exercise.



Plenary

During the exercise

- Step One can be used as a plenary brainstorming session after which participants are divided into small groups for Steps Two and Three.
- Participants come back into plenary for Steps Four and Five.



Small groups

Five Steps (Suggested time : 2 hours 15 minutes)

Step One can be conducted as a plenary discussion based on the semi-structured questions provided.

Alternatively, split participants into small groups to discuss the questions. The outcome of this reflection is then shared and compared in plenary.

Remind participants of the goal : to construct a profile of the achievements of the work unit in gender equality.

Suggested questions :

- What are the most significant opportunities and threats to gender mainstreaming in the region/sector?
- How do these affect gender relations in the region/sector?
- How has the work unit adapted to this reality?
- What does it want to achieve in relation to these threats and opportunities?
- How have the work unit's activities been affected?

Suggested time : 30 minutes

Step Two is conducted in small groups. Participants identify significant changes that have occurred in achieving gender equality at the target group, partner organization and institutional levels as a result of the work unit's action.

Participants compare what is happening in their respective sectors, regions or countries, at the following levels (write levels on a flip chart for all to see):

- Target groups and beneficiaries;
- The organization (refer to key results in the areas of action plans);
- Partner organizations concerning the strengthening of their capacity to work in a gender-sensitive manner such as increased gender competence of their staff and members, policy development and programmes on gender equality and mainstreaming, improved representation of women, adequate personnel policy;
- The institutional environment such as changes in laws, collective agreements, the development of effective strategies to improve the quality of women's employment and their access to decision-making, and effective influence on government policies for gender equality.

Suggested time: 20 minutes.

Step Three is conducted in the small groups. Participants write down the changes on cards, which are colour-coded for each level (target groups and beneficiaries, the organization, partner organizations, institutional environment).

Suggested time: 25 minutes.

Step Four is conducted in plenary. Participants try to establish which of the categories below best describes the changes:

- **Achieved** – based on a clear gender analysis of the context in which the work unit operates, objectives and strategies have been formulated and results have been defined and achieved. The work unit has made a difference
 - **Underway** – based on a clear gender analysis of the context in which the work unit operates, objectives and strategies have been defined and are in the process of being implemented.
- Agreements with partner organizations have been made, and support is being given to partners to improve their gender equality/women's empowerment capacity. Contacts with institutional partners and actors have been established.
 - The work unit has taken concrete actions towards becoming an organization that "practises what it preaches" in the area of gender equality.
 - Some ad hoc measures have been taken but without coherence or clear vision. Little yet achieved.

Suggested time: 25 minutes.

Step Five is conducted in plenary. Participants discuss the possibilities for change and improvement identified in the interventions.

Suggested time: 30 minutes.

Core exercise 6: Learning about learning



The groundwork

We'll find out about:

- What participants and facilitators have learned during the exercises conducted during the audit.

Suggested time

Five to 10 minutes at the end of each exercise. Twenty minutes at the end of the particular workshop (management/technical staff, support staff, partner organizations, etc.).

Method

At the end of each exercise, the participants and facilitators reflect on what they have learned in the course of the exercise and use this reflection to strengthen the learning process.

- Devote no more than 10 minutes to gathering participants' impressions of what they have learned in bullet form on a flip chart. The summary should be quick and light-hearted. There is no need to dwell on the issues.
- At the end of the workshop, put the set of flip charts from the exercises on the wall and summarize and discuss the lessons learned.

Preparation

- Prepare a flip chart with the name of the exercise entitled "What we have learned" for each exercise.
- Since this is the concluding exercise for the workshop, put the flip charts for all the exercises that have been conducted on the wall.

SAMPLE FLIP CHART	SUGGESTED MATERIALS
<p>Learning about Learning Exercise</p> <p>Goal: Strengthen the learning process and reflect on what we – both participants and facilitators – have learned.</p> <p>How: Discuss our expectations at the beginning of the workshop and what we have learned.</p> <p>Time: Five to 10 minutes at the end of each exercise and 20 minutes at the end of the particular workshop (management/technical staff, support staff, partner organizations, etc.).</p>	<ul style="list-style-type: none">• Flip chart entitled "What we have learned" to use at the end of the exercise.



Plenary

At the end of the final workshop

Use the following questions to guide plenary discussions on lessons learned:

- Did this workshop provide you with new insights and ideas, or did it help you modify your existing views?
- Did it help you to approach the subject in a different manner?
- Did the methodology of the audit help you to learn?
- Did the methodology help you to assess your organization/work unit's performance concerning gender issues?
- Did the methodology help you learn more about gender issues?
- Did the methodology help you to see how your work methods concerning gender issues could be changed?
- Which exercises during the workshop helped you to achieve some of the above-mentioned effects?

PART FOUR: FEEDBACK AND REPORTING

At the end of the audit

Preparing the executive summary

A key step in the audit process is the preparation of the executive summary of the gender audit 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.

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 have not always had any rigorous training on gender. Also, they do not necessarily have a common understanding of underlying gender equality 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;
- Give the director the executive summary to read prior to the debriefing in order that she can familiarize herself with the overall results of the audit and the recommendations proposed by the facilitation team;
- Hold a meeting between the director and the audit facilitation team members who can each play a role in introducing the findings, validating the positive work already accomplished and recommending areas for improvement. A positive climate ensures that the work unit can own the recommendations.

At the end of the debriefing, the director should be satisfied with the thoroughness of the gender audit facilitation team's work and assured that the results have been shared with the unit.

Holding the feedback session for the work unit

The aim of the feedback session is to present the major findings and recommendations of the gender audit to the director and all members of the work unit. This session is scheduled at the end of the audit and should last about three hours (with a short break).

- 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 audit;
- 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 good practices and three areas for improvement 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;
- 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. Encouraging action guides the participants through the last steps of the adult learning cycle, linking the learning process to effective change in work plans;
- A member of the audit facilitation team should explain the next step relating to the submission of the audit report to the work unit, as well as the unit’s responsibility for follow-up;
- A team member can also summarize the lessons learned by facilitators during the audit, and the feedback to be given to the organization’s gender audit coordinating structure so that the gender audit process can be continually improved.

It may also be useful to hand out the executive summary prepared for the debriefing with the director.

Model programme of a feedback session	
15:00 – 15:05	Introduction
15:05 – 15:15	Three areas of good practices in gender mainstreaming
15:15 – 15:25	Three areas to improve in gender mainstreaming
15:25 – 15:40	Discussion
15:40 – 16:00	Brainstorming on action planning
16:00 – 16:20	Recommendations on implementing the action plan
16:20 – 16:30	Close the session

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. A suggested outline for the report is provided in Part Five: Annexes.

The work that stems from this report demonstrates the true participatory nature of the exercise:

- The director and the staff of the work unit are responsible for implementing the recommendations contained in the report and for monitoring improvement in gender mainstreaming.
- The organization's gender audit coordinating structure is responsible for follow-up of the global recommendations that arise from the work unit audits. These recommendations should be compiled into a global report after all the work unit audits have been completed.
- Ideally, the organization's executive directors should have formal responsibility for monitoring the follow-up of the recommendations in the global report.

Some guiding principles

Facilitation team members should emphasize throughout the audit:

- 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 report should be completed and submitted in hard copy and electronically to:

- The director of the work unit before the facilitation team leaves the unit; and
- The gender focal point, 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.

When the report has been drafted, all members provide comments/suggestions, which are incorporated into the report when the text is edited and proofread. This approach is especially useful when members' mother tongue is different to the language of the report.

- The report should be no more than 30 pages long.



A practical tip

Systematically updating notes each day in a computer file helps to build up the information base for the report as the audit 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 and may ultimately motivate project coordinators towards positive action (see Part Five: Annexes for a model gender audit report).

Action planning

The aim of this session is to take advantage 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:

- Helps the work unit formulate an action plan;
- Invites the work unit to form a focal team or a task force (of not more than four members) to follow up on the audit's recommendations;
- Identifies three or four important areas to improve within the year. It should focus on visible, practical and achievable changes;
- Discusses 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 identified; and
- Reiterates that it is the director's responsibility to ensure that the action plan is implemented and feedback provided to the gender audit coordinating structure.

Understanding the ILO Participatory Gender Audit (PGA)

Implementing gender equality and decent work

The ILO views gender equality as integral to its vision of decent work for all women and men and as a fundamental principle in the effort to achieve its four strategic objectives :

- Promoting and realizing standards and fundamental principles and rights at work ;
- Creating greater opportunities for women and men to secure decent employment and income ;
- Enhancing the coverage and effectiveness of social protection for all ; and
- Strengthening tripartism and social dialogue.

The ILO's mandate to promote equality is enshrined in its Constitution and in a number of international labour standards. It is also expressed in a series of resolutions on gender equality adopted by the International Labour Conference. The most recent of these concerns the promotion of gender equality, pay equity and maternity protection adopted in 2004.

The Policy on Gender Equality and Mainstreaming in the ILO, announced by the Director-General in 1999, states that “mutually reinforcing action to promote gender equality should take place in staffing, substance and structure”. Whilst the policy's implementation, through a strategy of gender mainstreaming, is the responsibility of all ILO staff at all levels, accountability rests with senior managers, regional directors and programme managers.

Gender mainstreaming as a two-pronged strategy

In advancing equality in the world of work, the ILO has adopted a two-pronged gender mainstreaming strategy that :

- Promotes the gender dimension in all programmes and policies as well as gender-specific interventions (women- and/or men-specific) that redress longstanding inequalities ;
- Provides support to governments and employers' and workers' organizations in their promotion of gender equality by assessing and addressing the different needs and concerns of women and men in legislation, policies and programmes.

In order to assess the extent to which gender mainstreaming has been internalized within the ILO and learn how to enhance gender mainstreaming further, the ILO has been conducting participatory gender audits in accordance with its Action Plan for Gender Mainstreaming (2000).

Gender mainstreaming is the ILO strategy to achieve the goal of gender equality.

A brief history of ILO participatory gender audits

In October 2001, the ILO launched the first series of groundbreaking participatory gender audits. The objective was to promote organizational learning on the effective implementation of gender mainstreaming in the policies, programmes and structures of the Organization and to assess the progress made in achieving gender equality.

The gender audits' main focus was on auditing ILO Offices and increasing gender awareness and capacity among all those involved in planning and delivering ILO programmes and projects. A global desk review of 700 key ILO policy documents and major publications provided quantitative and verifiable information.

As a result of the first series of audits, which lasted until 2002, the Senior Management Team of the ILO endorsed proposals to:

- Clarify and deepen understanding among ILO staff and constituents of basic gender equality and gender mainstreaming concepts within the ILO mandate;
- Identify gender equality issues of critical concern in the Decent Work Agenda and define objectives and indicators;
- Systematize the existing gender materials and accelerate efforts to develop new tools, in particular, to collect and regularly publish sex-disaggregated data to inform policy formulation and programme designs; and
- Establish more effective monitoring and accountability mechanisms, processes, staffing or structural arrangements to improve the quality and consistency of ILO products and services.

These findings and recommendations helped establish and define the shared policy objective on gender equality that was launched in the 2004-2005 biennium.

A total of 28 ILO units/Offices were audited between 2001 and 2006, including 11 work units – sectors and programmes at ILO Headquarters – and 17 Field Offices in South and South East Asia, the Middle East, Europe, Africa and Latin America.

In 2003, the audits were extended to major ILO constituents. The aim was to reach out to decision-making bodies at the policy level. Audits were also conducted in 10 UN agencies in Zimbabwe at the request of the Inter-agency Group on Gender in Harare.

These audits contributed to enhancing individual and joint efforts to promote gender equality in their various interventions.

Four intensive Training of Facilitators (TOFs) were organized in Colombo (Sri Lanka), Harare (Zimbabwe), and Islamabad (Pakistan).

They resulted in the creation of a “pool” of trainers who immediately began building capacity among local gender experts and focal points. In Pakistan, appreciation of the relevance and usefulness of the gender audit was such that efforts are underway to incorporate the gender audit as a mandatory tool in a national policy and implementation strategy for the advancement of gender equality in the country.

Participatory gender audits are a tool for advancing the process of gender mainstreaming in the ILO.

Key findings and results of gender audits

The first series of gender audits showed that the high-level political commitment and the strategic budgeting process had boosted the promotion of gender equality in ILO policies and programmes. It also revealed that where managers were committed to gender equality and gender competence, there were clear results on gender mainstreaming at the level of work plans and implementation of activities.

An increasing number of good practices and products developed throughout the Organization to promote gender equality were identified. However, among managers and staff there was still confusion on basic gender equality concepts and on the differences between women-specific activities and the “gender and development” approach.

The audits also found that although the level of incorporation of gender equality concerns at the different stages of design, implementation, monitoring and evaluation had improved, they had not been institutionalized. This resulted in wide variations in the quality of ILO products and services and persistent examples of gender-blind work.

Some critical findings from audits	Positive outcomes from selected audited ILO units/Offices
<ul style="list-style-type: none">• Though committed in principle to gender equality, conceptual clarity on gender concepts and gender mainstreaming found to be rather limited.• Gender is still considered an “add on”. There is a need to make it “visible”, “specific”, “explicit”, “concrete” and “integrated”.• Limited exposure to gender mainstreaming tools and methodologies.• How to integrate gender into technical areas is the “million dollar question” posed by all.• There is a need to develop mechanisms for accountability on gender mainstreaming.• There is a lack of specific gender indicators that would help track progress made or obstacles encountered.• There is a lack of consistency and sustainability of gender mainstreaming throughout institutional structures and mechanisms.• There is a need for management to explore ways of highlighting and recognizing good practices in gender mainstreaming.	<ul style="list-style-type: none">• Gender equality built into the monitoring and evaluation of the ILO’s shared objectives.• Project documents examined through a “gender filter”.• Flexible working time and working from home arrangements to promote family-friendly workplaces.• Improved efforts in gender mainstreaming in technical cooperation projects.• New user-friendly tools on gender and child labour published.• Advocacy strategies to promote gender equality in IPEC¹ programmes strengthened.• Gender focal team set up to monitor implementation of audit recommendations.• Country-specific vision on gender equality and gender mainstreaming strategy developed.

¹IPEC: ILO’s International Programme on the Elimination of Child Labour.

Gender audits of ILO constituents

In 2004, gender audits were carried out with four constituent organizations in Sri Lanka: The Ministry of Labour and Employment, Employers' Federation of Ceylon (EFC) and two trade union federations, Ceylon Workers' Congress (CWC) and Sri Lanka Nidahas Sewaka Sangamaya (SLNSS).

Following completion of the audits, a meeting was held with all participating partners to share lessons learned on effective solutions to the gender gaps. Linkages were made with the ILO's Decent Work Agenda and Plans of Action were set up for each of the audited institutions. This intensive exercise highlighted various measures and strategies that could be used to address gender equality issues in the national context of Sri Lanka.

Initiatives in Sri Lanka after the audit

- A Gender Bureau was set up in the Ministry of Labour and Employment, its vision and mandate determined, roles and budget clarified and activities initiated.
- The role and status of the Women's Division in SLNSS was strengthened.
- A gender task force was effectively monitoring implementation.

The first major ILO gender audit of an international federation was carried out with the ICFTU¹ in 2005. It was also the largest single gender audit facilitated by the ILO at that time.

The call for an ICFTU gender audit came with the resolution "Unions for Women, Women for Unions", which was adopted at the 18th ICFTU World Congress in December 2004. The gender audit was perceived as a significant step in furthering the ICFTU's work to promote gender equality.

Initiatives after the ICFTU audit

The findings and recommendations of the audit were reported to the ICFTU Executive Board in December 2005. A plan of action was discussed on the Women's Committee in March 2006.

Gender audits of UN agencies

Between 2004 and 2005, gender audits were conducted in 10 UN agencies in Harare: FAO, ITU, UNAIDS, UNDP/UNIASU, UNESCO, UNFPA, UNICEF, WFP and WHO. The World Bank also participated.

In Mozambique, ILO assistance was provided for a gender audit of the UNDP Office in Maputo, in collaboration with the ILO International Training Centre in Turin.

Impact of UN audits (2004)

- Sensitization on gender strengthened within UN agencies.
- Gender equality issues receiving more focus in interventions with national partners.
- Gender task force set up to monitor gender equality.

² ICFTU: International Federation of Free Trade Unions.

Document analysis table for administrative documents

The document analysis table on pages 106-108 seeks to elicit general evidence of a gender perspective or gender analysis in the documents being reviewed. It is applicable to administrative documents in the following areas:

- Staffing and human resources
- Programme and budget
- Missions
- Office floor plans
- Staff meeting agendas
- Consultancy

Indicate the document type (e.g., staffing and human resources) in Part 1 and enter the document title. Then, rate the statements in Part 2 that apply to the document in terms of how well they describe it by circling the appropriate number. Use a new Part 2 for each document analysed.

In your view, how well do the following statements fit the document? Use the following scale from 0-5 when responding:

- 0 – statement does not fit at all
- 1 – statement fits some parts (10-25%)
- 2 – statement fits moderately (25-50%)
- 3 – statement fits adequately (50-75%)
- 4 – statement fits quite well (75-95%)
- 5 – statement fits very/absolutely well (95-100%) (Gender is mainstreamed throughout the document consistently)

The right-hand column is reserved for your comments. We encourage you to use it to complement your analysis. Now add up the statement scores and enter the total next to the title in Part 1.

Part 1

[illegible]

Part 2

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. 0 1 2 3 4 5	
Women and men are both represented in decision-making positions and roles in the unit (senior management and above). 0 1 2 3 4 5	
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. 0 1 2 3 4 5	
Records indicate that staff have participated in awareness-raising/training/capacity building courses or seminars on gender. 0 1 2 3 4 5	
Staffing and succession planning documents reflect awareness of human resources policies on positive gender action. 0 1 2 3 4 5	
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. 0 1 2 3 4 5	
Staff meeting agendas	
Staff meeting agendas show that gender issues are frequently raised and addressed in regular meetings. 0 1 2 3 4 5	
Office floor plans	
The office floor plan shows a fair distribution of choice offices to both men and women. 0 1 2 3 4 5	

cont'd.

Analysis	Comments
Programme and budget	
<p>Programme and budget documents clearly indicate gender objectives and indicators for the unit.</p> <p>0 1 2 3 4 5</p>	
<p>Programme and budget documents clearly indicate what resources are ear-marked for gender-related work.</p> <p>0 1 2 3 4 5</p>	
Missions	
<p>All management/technical staff regardless carry out missions regardless of rank and sex.</p> <p>0 1 2 3 4 5</p>	
<p>Mission reports reflect gender issues being raised in the context of the work undertaken, regardless of men or women counterparts.</p> <p>0 1 2 3 4 5</p>	
<p>Mission reports reflect efforts made to seek out women interlocutors among counterparts in the organizations visited.</p> <p>0 1 2 3 4 5</p>	
Consultancy	
<p>Terms of reference for consultants stipulate that gender equality issues should be reported upon substantially within the context of their assignment.</p> <p>0 1 2 3 4 5</p>	
<p>Consultancy projects are given to both men and women.</p> <p>0 1 2 3 4 5</p>	
<p>Women and men consultants are remunerated on an equitable basis, using the same contractual criteria.</p> <p>0 1 2 3 4 5</p>	
<p>Screening and selection of consultants include demonstrable gender sensitivity criteria.</p> <p>0 1 2 3 4 5</p>	

Administrative document category summary

Document type	Number of documents analysed	Total score (add up the scores for this document type from all of the unit's document analysis tables)	Average score (divide the total score by the number of documents analysed)
Staffing and human resources			
Staff meeting agendas			
Office floor plans			
Programme and budget			
Missions			
Consultancy			
Administrative document category average (add up the average scores for the six types of document)			

Kindly use the space below to record any salient comments from the unit's administrative document analysis tables that you think can inform your organization's discussion on gender mainstreaming. Please use additional sheets, if necessary.

Document analysis table for documents on technical/substantive issues

The document analysis table on pages 110-112 seeks to elicit general evidence of a gender perspective or gender analysis in the documents being reviewed. Indicate the document title in Part 1 and rate each of the statements in Part 2 in terms of how well it describes the document by circling the appropriate number. In your view, how well do the following statements fit the document? Use the following scale from 0-5 when responding:

0 – statement does not fit at all

1 – statement fits some parts (10-25%)

2 – statement fits moderately (25-50%)

3 – statement fits adequately (50-75%)

4 – statement fits quite well (75-95%)

5 – statement fits very well/absolutely (95-100%) (Gender is mainstreamed throughout the document consistently)

The right-hand column is reserved for your comments. We encourage you to use it to complement your analysis. Now add up the statement scores and enter the total next to the title in Part 1.

Part 1

Unit/sector		
	Document title	Score

Part 2

Analysis	Comments
<p>The document reflects that the work unit has incorporated a gender perspective in its analysis of economic, social, political and environmental factors.</p> <p>0 1 2 3 4 5</p>	
<p>It shows conceptual clarity on what gender equality, gender mainstreaming, etc., mean.</p> <p>0 1 2 3 4 5</p>	
<p>It uses and analyses gender-disaggregated data/information.</p> <p>0 1 2 3 4 5</p>	
<p>It uses gender-sensitive language.</p> <p>0 1 2 3 4 5</p>	
<p>It takes into account the different experiences of women and men, for example, in the case studies, anecdotal or testimonial materials.</p> <p>0 1 2 3 4 5</p>	
<p>It distinguishes between a focus on one sex and a focus on gender relations.</p> <p>0 1 2 3 4 5</p>	
<p>Its references to women and gender equality are substantive, not mechanistic or tokenistic (lip service).</p> <p>0 1 2 3 4 5</p>	
<p>It treats gender equality as a central issue not as an add-on.</p> <p>0 1 2 3 4 5</p>	
<p>The document reflects mechanisms for planning, monitoring and evaluating that are conducive to mainstreaming gender equality.</p> <p>0 1 2 3 4 5</p>	
<p>Lists of participants of meetings held by the work unit show an equal balance of women and men participants at the events.</p> <p>0 1 2 3 4 5</p>	

cont'd.

Analysis	Comments
Both men and women actively took part in the deliberations, as covered in the report or summary of the meeting. 0 1 2 3 4 5	
Gender issues were on the agenda of the meetings, and were considered of importance to the topic being discussed. 0 1 2 3 4 5	

Technical/substantive document category summary

Unit/sector		
Number of documents analysed	Total score (add up the scores from all of the unit's technical and/or substantive document analysis tables)	Average score (divide the total score by the number of documents analysed)
Technical/substantive category average (in this category, the average score is the category average)		

Use the space below to record any salient comments from the unit's technical/substantial document analysis tables that you think can inform your organization's discussion on gender mainstreaming. Please use additional sheets, if necessary.

Document analysis table for information/promotion documents/products

The document analysis table on pages 113-115 seeks to elicit general evidence of a gender perspective or gender analysis in the documents being reviewed. Indicate the document title in Part 1 and rate each of the statements in Part 2 in terms of how well it describes the document by circling the appropriate number.

In your view, how well do the following statements fit the document? Use the following scale from 0-5 when responding:

0 – statement does not fit at all

1 – statement fits some parts (10-25%)

2 – statement fits moderately (25-50%)

3 – statement fits adequately (50-75%)

4 – statement fits quite well (75-95%)

5 – statement fits very well (95-100%)

(Gender is mainstreamed throughout the document consistently)

The right-hand column is reserved for your comments. We encourage you to use it to complement your analysis. Now add up the statement scores and enter the total next to the title in Part 1.

Part 1

Unit/sector		
	Document title	Score

Part 2

Analysis	Comments
<p>The product³ 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.</p> <p>0 1 2 3 4 5</p>	
<p>The unit's programme objectives, strategies, activities or results are defined in a gender-specific manner in the information/promotion product.</p> <p>0 1 2 3 4 5</p>	
<p>The product includes credible references to issues of gender equality as relating to the work of the unit.</p> <p>0 1 2 3 4 5</p>	
<p>There is a real effort to eliminate gender bias in the overall message of the information/promotion product.</p> <p>0 1 2 3 4 5</p>	
<p>The product consistently uses gender-sensitive language.</p> <p>0 1 2 3 4 5</p>	
<p>If graphics are used, they give a gender-sensitive balanced look and do not give a subliminal "masculine" message.</p> <p>0 1 2 3 4 5</p>	
<p>If pictures are used, there is an equal number of women and men represented or engaged in similar activities.</p> <p>0 1 2 3 4 5</p>	
<p>If a video or CD is being reviewed, the same number of men and women are interviewed, used as case studies, etc.</p> <p>0 1 2 3 4 5</p>	

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.

Analysis	Comments
Graphics or photographs used on the web site reflect gender balance. 0 1 2 3 4 5	
The work unit web site includes substantive references to work on gender equality. 0 1 2 3 4 5	
The work unit web site provides information on or creates links to other sources of information on gender issues so as to increase accessibility. 0 1 2 3 4 5	

Information/promotion document/product category summary

Unit/sector		
Number of documents/ products analysed	Total score (add up the scores from all of the unit's Information/promotion document/product analysis tables)	Average score (divide the total score by the number of documents/products analysed).
Information/promotion category average (in this category, the average score is the category average)		

Use the space below to record any salient comments from the unit's information/promotion document/product analysis tables that you think can inform your organization's discussion on gender mainstreaming. Please use additional sheets if necessary.

Document analysis table for documents on technical cooperation

The document analysis table on pages 116-118 seeks to elicit general evidence of a gender perspective or gender analysis in the documents being reviewed. Indicate the document title in Part 1 and rate each of the statements in Part 2 in terms of how well it describes the document by circling the appropriate number.

In your view, how well do the following statements fit the document? Use the following scale from 0-5 when responding:

0 – statement does not fit at all

1 – statement fits some parts (10-25%)

2 – statement fits moderately (25-50%)

3 – statement fits adequately (50-75%)

4 – statement fits quite well (75-95%)

5 – statement fits very/absolutely well (95-100%) (Gender is mainstreamed throughout the document consistently)

The right-hand column is reserved for your comments. We encourage you to use it to complement your analysis. Now add up the statement scores and enter the total next to the title in Part 1.

Part 1

Unit/sector		
	Document title	Score

Part 2

Analysis	Comments
<p>The document reflects that the project has incorporated a gender perspective in its analysis of economic, social political and environmental factors.</p> <p>0 1 2 3 4 5</p>	
<p>It shows conceptual clarity on what gender equality, gender mainstreaming, etc., mean to the project.</p> <p>0 1 2 3 4 5</p>	
<p>The document uses and analyses gender-disaggregated data/information in the background situation analysis and justification.</p> <p>0 1 2 3 4 5</p>	
<p>It uses gender-sensitive language.</p> <p>0 1 2 3 4 5</p>	
<p>It takes into account the different experiences of women and men, for example, in case studies, anecdotal or testimonial materials.</p> <p>0 1 2 3 4 5</p>	
<p>It distinguishes between a focus on one sex and a focus on gender relations.</p> <p>0 1 2 3 4 5</p>	
<p>Its references to women and gender equality are substantive, not mechanistic or tokenistic (lip service).</p> <p>0 1 2 3 4 5</p>	
<p>The document demonstrates the differential impacts of technical cooperation on women and men.</p> <p>0 1 2 3 4 5</p>	
<p>The document incorporates gender equality objectives as identified in the geographic regions(s) where the technical cooperation project is being implemented.</p> <p>0 1 2 3 4 5</p>	
<p>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.</p> <p>0 1 2 3 4 5</p>	

Analysis	Comments
<p>The document outlines key project activities that serve the interests of men and women equally.</p> <p>0 1 2 3 4 5</p>	
<p>It outlines clearly what commitment of time and resources are made available for gender mainstreaming, including separate budget allocation.</p> <p>0 1 2 3 4 5</p>	
<p>The document focuses on women's empowerment and provides for separate programmes and activities.</p> <p>0 1 2 3 4 5</p>	
<p>The document addresses men's contribution, benefits and behaviour in relation to gender equality.</p> <p>0 1 2 3 4 5</p>	
<p>The document indicates capacity building for project staff, partner organizations and implementing partners on gender equality concepts and gender mainstreaming.</p> <p>0 1 2 3 4 5</p>	
<p>The document 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.</p> <p>0 1 2 3 4 5</p>	
<p>Lists of participants at meetings held by the project show and equal balance of women and men participants at the events.</p> <p>0 1 2 3 4 5</p>	
<p>Both men and women actively took part in the deliberations, as covered in the summary of the report of project meetings.</p> <p>0 1 2 3 4 5</p>	
<p>Gender issues were on the agenda of the project meetings, and were considered of importance to the topic being discussed.</p> <p>0 1 2 3 4 5</p>	

Technical cooperation document category summary

Unit/sector		
Number of documents analysed	Total score (add up the document scores from all of the unit's technical cooperation document analysis tables)	Average score (divide the total score by the number of documents analysed)
Technical cooperation category average (in this category, the average score is the category average)		

Use the space below to record any salient comments from the unit's technical cooperation document analysis tables that you think can inform the your organization's discussion on gender mainstreaming. Please use additional sheets if necessary.

Unit document analysis summary

Unit/sector			
Document category	Total number of documents (transfer the number of documents for this category from the document category summary)	Total score (transfer the total score for this category from the document category summary)	Average score (transfer the category average from the document category summary)
Administrative			
Technical/substantive issues			
Information/promotion			
Technical cooperation			
Unit document analysis summary (add up the category averages for the four document categories)			

Use the boxes on the next page to record any salient comments from the unit's document category summaries that you think could inform your organization's discussion on gender mainstreaming. Please use additional sheets, if necessary.

Gender-specific documents: Please use the following space and add extra sheets if necessary.

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: Please use the following space and add extra sheets, if necessary.

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?

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.

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.

Concepts	Definitions	Additional information
Affirmative (positive) action	Affirmative (positive) action means special temporary measures to redress the effects of past discrimination in order to establish de facto equal opportunity and treatment between women and men.	Affirmative action in favour of women should not be considered as discriminatory against men in a transitional period. Once the consequences of past discrimination have been rectified, the measures should be removed to prevent discrimination against men. For example: measures ensuring that women have equal recruitment and promotion opportunities.
Basic/practical gender needs	<p>Basic/practical gender needs are needs 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.</p> <p>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.</p>	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.

Decent work for men and women (or women and men)	Productive work performed in conditions of freedom, equity, security and human dignity, to which women and men have access on equal terms.	The ILO's "Decent Work" concept is based on the expressed wish of women and men for work that will allow them and their families to have access to a decent standard of living. Decent work means meeting or exceeding core social standards – setting a threshold for work and employment which embodies universal rights, and which for a given society is consistent with its values and goals. Gender equality is at the heart of the Decent Work Agenda.
Equal opportunity	<p>Equal opportunity means equal access to all economic, political and social participation and facing no barriers on the grounds of sex.</p> <p>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.</p> <p>Equal treatment in the world of work refers to equal entitlements such as in pay, working conditions, employment security and social security.</p>	

Concepts	Definitions	Additional information
Equal remuneration	The principle of equal pay for work of equal value (as defined in the ILO Remuneration Convention, 1951 (No. 100)), 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.	<p>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.</p> <p>The principle of equal pay for work of equal value can be implemented by some practical measures:</p> <ul style="list-style-type: none"> • 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 seeks to redress it at the personal, relational and societal levels.	

GAD (Gender and Development)	<p>The GAD approach emerged in the 1980s as a result of WID and its shortcomings, concentrating on the unequal relations between men and women due to “uneven playing fields”. It focuses not only on women as an isolated and homogeneous group, but on the roles and needs of both men and women.</p>	<p>The term gender as an analytical tool arose from an increasing awareness of inequalities due to institutional structures. Given that women are usually in a disadvantaged position as compared to men, promotion of gender equality implies an explicit attention to women’s needs, interests and perspectives in order to change unequal structures in societies. The objective then is the advancement of the status of women in society, with gender equality as the ultimate goal.</p>
Gender	<p>Gender refers to the social differences and relations between men and women that are learned, changeable over time, and have wide variations both within and between societies and cultures. These differences and relationships are socially constructed and are learned through the socialization process. They determine what is considered appropriate for members of each sex. They are context-specific and can be modified.</p> <p>Other variables, such as ethnicity, caste, class, age and ability intersect with gender differences.</p>	<p>Gender is distinct from sex since it does not refer to the different physical attributes of men and women, but to socially formed roles and relations of men and women and the variable sets of beliefs and practices about male and female that not only feed into individual identities, but are fundamental to social institutions and symbolic systems.</p> <p>The concept of gender also includes expectations held about the characteristics, aptitudes and likely behaviour of women and men (femininity and masculinity).</p>

Concepts	Definitions	Additional information
Gender analysis	<p>Gender analysis is a systematic tool to examine social and economic differences between women and men. It looks at their specific activities, conditions, needs, access to and control over resources, as well as their access to development benefits and decision-making. It studies these linkages and other factors in the larger social, economic, political and environmental context.</p>	<p>The findings of the gender analysis must be used to inform strategic planning of any interventions.</p> <p>Gender analysis and planning (see below under <i>Gender planning</i>) are also required for the development and implementation of specific measures to promote equality of opportunity and treatment between men and women workers. All policies and programmes, whether at the macro, sectoral or micro levels, need to engage in gender analysis and planning as a means not only to achieve gender equality but as a contribution to realizing their overall goals. Gender analysis entails, first and foremost, collecting sex-disaggregated data (i.e., data broken down by sex) and gender-sensitive information about the concerned population. Gender analysis is the first step in gender-sensitive planning to promote gender equality. Gender analysis is not confined to identifying differences.</p> <p>More importantly, it recognizes the politics of gender relations and the adjustments needed to be undertaken by institutions to attain gender equality. It looks at the inequalities between women and men, asks why they exist, and suggests how the gap can be narrowed.</p> <p>Gender analysis in the ILO context entails looking at five key variables:</p> <ul style="list-style-type: none"> • The division of labour between men and women ; • The different needs of men and women ; • The sex-based division of access to and control over resources and benefits ; • Opportunities and constraints in the social and economic environment ; • The capacity of ILO constituents and other partner organization to promote equality between men and women in employment.

Gender-aware/sensitive policies	Such 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	Gender-blind describes 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 analysed 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.

Concepts	Definitions	Additional information
Gender equality	Gender equality, or equality between men and women, entails the concept that all human beings, both men and women, are free to develop their personal abilities and make choices without the limitations set by stereotypes, rigid gender roles and prejudices. Gender equality means that the different behaviour, aspirations and needs of women and men are considered, valued and favoured equally. It does not mean that women and men have to become the same, but that their rights, responsibilities and opportunities will not depend on whether they are born male or female.	Equality between women and men is both a human rights issue and a precondition for sustainable people-centered development and decent work (see above under <i>Decent work for men and women (or women and men)</i>).
Gender equality in the world of work	Gender equality in the world of work, within the ILO Decent Work Agenda, refers to : <ul style="list-style-type: none"> • 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. 	Promoting gender equality in the Decent Work Agenda requires advocating: <ul style="list-style-type: none"> • The same fundamental human and workers' rights for men and women ; • A fair distribution between men and women of responsibilities and opportunities, paid and unpaid work and decision-making.
Gender equity	Gender equity means fairness of treatment for women and men, according to their respective needs. This may include equal treatment or treatment that is different but which is considered equivalent in terms of rights, benefits, obligations and opportunities. Equity is a means ; equality is the goal.	For example, access to education, depending on whether the child is a boy or a girl. 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	<p>Gender mainstreaming is a globally accepted strategy for promoting gender equality. Mainstreaming is not an end in itself but a strategy, an approach, a means to achieve the goal of gender equality. Mainstreaming involves ensuring that gender perspectives and attention to the goal of gender equality are central to all activities policy development, research, advocacy/dialogue, legislation, resource allocation, and planning, implementation and monitoring of programmes and projects.</p> <p>In 1997, the United Nations Economic and Social Council defined the concept of gender mainstreaming as follows:</p> <p>“...the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas 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.”</p>	<p>Gender mainstreaming needs to take place at the policy, programme and project levels at all stages of the programming cycle (design, planning, implementation, monitoring and evaluation).</p> <p>Gender mainstreaming includes action on:</p> <ul style="list-style-type: none"> • Undertaking a gender analysis with a view to identifying inequalities between men and women which need to be addressed; • Providing equal opportunities to all and carrying out gender specific action wherever inequalities are pronounced; • Starting a process of institutional change; • Giving girls and women a voice; • Carrying out gender budgeting; • Undertaking participatory gender audits.
Gender-neutral policies	<p>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</p>	<p>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.</p> <p>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 and so make it more difficult to address underlying gender inequalities.</p>

Concepts	Definitions	Additional information
Gender and organizational change	<p>Gender and organizational change refers to the fact that organizations are some of the main perpetrators of unequal gender relations.</p> <p>If gender relations in society are to change, organizations should promote gender-sensitive policies and programmes, and ensure gender balance in their structures.</p>	
Gender planning	<p>Gender planning consists of developing and implementing specific measures and organizational arrangements (for example, capacity to carry out gender analysis, collect sex-disaggregated data) for the promotion of gender equality, and ensuring that adequate resources are available (for example, through <i>gender budgeting</i>, see above).</p> <p>Gender planning is an active approach to planning which takes gender as a key variable or criteria and which seeks to integrate an explicit gender dimension into policies or action.</p>	See <i>Gender analysis</i> .
Gender redistributive policies	<p>These are interventions that intend to transform existing distributions to create a more balanced relationship between men and women; they may target both women and men or one of the two according to the situation. They touch on strategic needs as well as on practical/basic needs, but do so in ways that have potential to change, which help build up the supportive conditions for women to empower themselves.</p>	

<p>Gender roles</p>	<p>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.</p> <p>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.</p> <p>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.</p> <p>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).</p>	<p>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.</p> <p>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 management – in society.</p> <p>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.</p>
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Concepts	Definitions	Additional information
Gender-sensitive indicators	<p>Are designed to measure benefits to women and men and capture quantitative and qualitative aspects of change.</p> <p>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.</p> <p>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.</p>	<p>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.</p> <p>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.</p> <p>Examples of gender-sensitive indicators are :</p> <p>Quantitative :</p> <ul style="list-style-type: none"> • 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. <p>Qualitative :</p> <ul style="list-style-type: none"> • 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-sensitive policies	See <i>Gender-aware/sensitive policies</i> .	

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 artificial barriers, created by attitudinal and organizational prejudices that block women from senior executive management positions.	<p>The phrase “glass ceiling” is used to describe the invisible barriers arising from a complex set of structures in male-dominated organizations that prevent women from obtaining top positions in management and administration. This phenomenon prevails almost everywhere despite women’s increased level of qualifications and work performance. It has been demonstrated by research and statistics, and is, at least partly, a result of persistent discrimination against women at work.</p>
Harassment	Refers to any kind of emotional and physical abuse, persecution or victimization. Harassment and pressure at work can consist of various forms of offensive behaviour. Harassment is characterized by persistently negative attacks of a physical or psychological nature on an individual or group of employees, which are typically unpredictable, irrational and unfair.	<p>No employee – female or male – should be subject to harassment or pressure in any term or condition of employment. 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.</p>

Concepts	Definitions	Additional information
Men and masculinity	Refers to the need to better understand the male side of gender relations. It involves understanding the masculine values and norms that society places on men's behaviour, identifying and addressing issues confronting men and boys in the world of work, and promoting the positive roles that men and boys can play in attaining gender equality.	
Occupational sex segregation	Refers to a situation in which women and men are concentrated in different types of jobs and at different levels of activity and employment, with women being confined to a narrower range of occupations (horizontal segregation) than men, and to the lower grades of work (vertical segregation).	<p>This situation rarely stems from direct discrimination through legislation limiting women's access to training and employment. The causes are usually to be found in practices based on stereotypes and prejudices concerning the roles of women and men in society.</p> <p>In most non-agricultural labour markets in the world, most people work in occupations in which up to 80 per cent of the workforce is either male or female. On the basis of this inequality, occupations tend to be typified as "male" (e.g., those in the manufacturing sector) or "female" (e.g., those in the services sector).</p>
Practical/basic gender needs	(See Basic practical gender needs and Strategic gender needs.)	
Sex	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. (See also <i>Gender</i> .)	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	<p>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.</p> <p>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.</p>	

Sex discrimination	<p>Differential treatment of men and women – in employment, education and access to resources and benefits, etc. – on the basis of their sex.</p> <p>Discrimination may be direct or indirect.</p> <p>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).</p> <p>Indirect sex discrimination is when rules and practices that appear gender-neutral in practice lead to disadvantages primarily suffered by persons of one sex.</p> <p>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.</p>	<p>Discrimination is defined in ILO Convention No. 111 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.</p> <p>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.</p>
Strategic gender needs	<p>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.</p> <p>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.</p>	<p>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.</p> <p>Benefits that only target practical needs (see above, <i>Basic/practical gender needs</i>) will not be sustainable unless strategic needs are also taken into account. Strategic needs cannot be met without attention to practical needs.</p>

Concepts	Definitions	Additional information
WID (Women in Development Approach)	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.	<p>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.</p> <p>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.</p>
Women's empowerment	<p>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.</p> <p>It involves women taking control over their lives : setting own agendas, gaining skills, solving problems and developing self-reliance.</p>	<p>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 :</p> <ul style="list-style-type: none"> • 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.

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 gender audit 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, participatory gender audits 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 gender audit 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 audit 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,

Director
Gender audit coordinating structure

Sample gender audit calendar

Gender Audit Programme (5-16 July 2006, ILO Office, Colombo, Sri Lanka)		
Date	Time	Purpose
Sunday, 4 July	12:20 Afternoon	Arrival of audit facilitation team members Planning meeting between team members
Monday, 5 July	09:05 – 11:00 Afternoon	Meeting with Colombo Office focal point Orientation with local constituents Consultation on document reviews
Tuesday, 6 July	08:30 – 09:00 09:30 – 10:30 10:30 – 12:00 13:00 – 17:00	Team meets with Director Team meets with entire staff Plan support staff workshop Plan individual interview questions Conduct individual interviews with support staff
Wednesday, 7 July	08:30 – 12:30 13:30 – 15:30 15:30 – 17:00	Support staff workshop Draft report on support staff workshop Individual interviews with management/technical staff Discussion on document reviews Plan final report skeleton Individual interviews with management/technical staff
Thursday, 8 July	08:30 – 12:00 13:00 – 14:00 Afternoon	Individual interviews Plan management/technical staff workshop Conduct management/technical staff workshop
Friday, 9 July	09:00 – 17:00	Management/technical staff workshop
Saturday, 10 July	All day	Free time
Sunday, 11 July		Team consultation
Monday, 12 July	09:00 – 13:00 Afternoon	Individual interviews Individual interviews Draft report on management/technical staff workshop
Tuesday, 13 July	08:30 – 12:00 13:00 – 17:00	Prepare consultations with implementing partners, women's organizations and constituents Group consultations with implementing partners
Wednesday, 14 July	09:00 – 12:00 13:00 – 17:00	Group consultations with women's organizations Draft report on consultations
Thursday, 15 July	09:00 – 12:00 13:00 – 17:00	Desk review consolidation Draft report preparation Draft report consolidation Executive summary finalization
Friday, 16 July	09:00 – 12:00 13:00 – 17:00	Team consultation on draft report Preparation for feedback session Debriefing of Director Feedback session/Action planning

Model gender audit 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 key criteria areas:

- Gender issues in the context of the work unit and existing gender expertise, competence and capacity building (A and D)
- Gender issues in work unit's objectives, programming and implementation cycles, and choice of partner organizations (B, C, F and G)
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Annexes (including programme of work unit audit; list of workshops, sessions, participants and facilitation programme; list of documents reviewed; and, if available, historical timeline of gender-related activities)

Sample of a Gender audit report

Gender audit report

[Name of organization]	XXXX
[Dates of audit]	22-26 January 2010
[Members of facilitation team]	Ms.
	Mr.
	Mr.
	Ms.
	Ms.
	Mr.

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THE ILO PARTICIPATORY GENDER AUDIT METHODOLOGY

The first of its kind in the UN system, this manual provides gender audit facilitators with guidelines and practical instructions on how to plan and implement participatory gender audits in an organizational context. Structured chronologically, it provides the facilitators with a set of tools that help examine the extent to which equality is being institutionalized; it identifies good practices in technical work; and points to effective and efficient ways of moving forward in mainstreaming gender in all work activities.

A step-by-step approach is used that leads facilitators through each stage of the audit process, culminating with a set of recommendations and an action plan on how to improve the gender mainstreaming strategy in a given institutional setting. The manual also explains the rationale behind the use of the participatory methodology, its usefulness and relevance.

Though developed primarily to guide gender audit facilitators within the ILO, the manual can easily be adapted to suit a wide variety of organizations wishing to conduct gender audits at either institutional, programme or project levels.



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