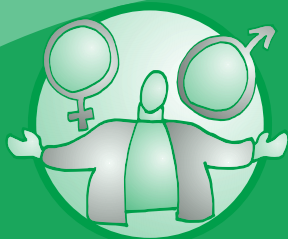


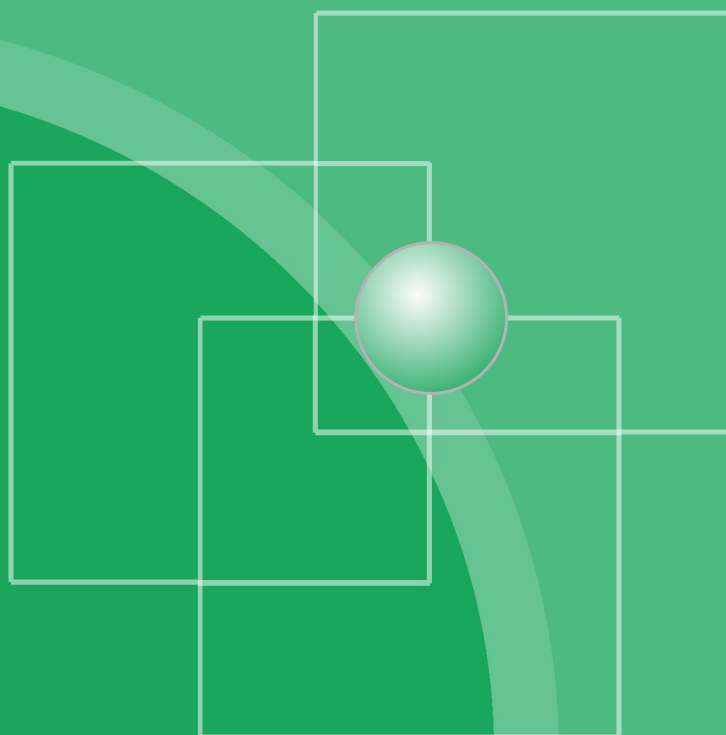


International  
Labour  
Organization



# FAMOS

**CHECK GUIDE AND METHODS**  
Female And Male Operated Small enterprises



A gender-based service quality check  
for supporting small enterprises





# **FAMOS CHECK GUIDE AND METHODS**

**A gender-based service quality check  
for supporting small enterprises**

**International Labour Organization**

Copyright © International Labour Organization 2006  
First published 2006

Publications of the International Labour Office enjoy copyright under Protocol 2 of the Universal Copyright Convention. Nevertheless, short excerpts from them may be reproduced without authorization, on condition that the source is indicated. For rights of reproduction or translation, application should be made to the Publications Bureau (Rights and Permissions), International Labour Office, CH-1211 Geneva 22, Switzerland, or by email: [pubdroit@ilo.org](mailto:pubdroit@ilo.org). The International Labour Office welcomes such applications.

Libraries, institutions and other users registered in the United Kingdom with the Copyright Licensing Agency, 90 Tottenham Court Road, London W1T 4LP [Fax: (+44) (0)20 7631 5500; email: [cla@cla.co.uk](mailto:cla@cla.co.uk)], in the United States with the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923 [Fax: (+1) (978) 750 4470; email: [info@copyright.com](mailto:info@copyright.com)] or in other countries with associated Reproduction Rights Organizations, may make photocopies in accordance with the licences issued to them for this purpose.

---

ILO

*Famos Check Guide and Methods: A gender-based service quality check for supporting small enterprises*  
Geneva, International Labour Organization, 2006

ISBN 978-92-2-119707-2 (print) – 978-92-2-119708-9 (web pdf)

*ILO Cataloguing in Publication Data*

---

The designations employed in ILO publications, which are in conformity with United Nations practice, and the presentation of material therein do not imply the expression of any opinion whatsoever on the part of the International Labour Office concerning the legal status of any country, area or territory or of its authorities, or concerning the delimitation of its frontiers.

The responsibility for opinions expressed in signed articles, studies and other contributions rests solely with their authors, and publication does not constitute an endorsement by the International Labour Office of the opinions expressed in them.

Reference to names of firms and commercial products and processes does not imply their endorsement by the International Labour Office, and any failure to mention a particular firm, commercial product or process is not a sign of disapproval.

ILO publications can be obtained through major booksellers or ILO local offices in many countries, or direct from ILO Publications, International Labour Office, CH-1211 Geneva 22, Switzerland. Catalogues or lists of new publications are available free of charge from the above address, or by email: [pubvente@ilo.org](mailto:pubvente@ilo.org)

Visit our website: [www.ilo.org/publns](http://www.ilo.org/publns)

---

Printed in Italy

## FOREWORD

In the past 10 years or so, there has been increasing attention devoted by policy-makers, development organizations and financing institutions to the role that micro, small and medium-sized enterprises (MSMEs) can play in economic development, employment creation and poverty reduction. This has also seen the parallel evolution of a range of demand-led, market-oriented services to support the creation and growth of MSMEs through financial and non-financial mechanisms. These “non-financial” support mechanisms have come to be known as business development services (BDS).

Based on what is known as the BDS “market paradigm”, the operation of these open and competitive market mechanisms has tended to disregard the situation and needs of excluded and marginalized groups of clients, and glossed over pervasive and underlying forms of bias and discrimination as experienced by many women seeking to engage in the economic arena. Many of these market mechanisms are “gender blind”, and ignore the fact that women – more so than men – experience barriers and difficulties in starting and growing their own enterprises.

In 2003, the Government of the United Republic of Tanzania adopted a new Small and Medium Enterprise (SME) Policy, within which it assigned importance to mainstreaming gender equality and the interests of marginalized groups. The Ministry of Industry and Trade SME Section (now Department) approached the ILO and its programme working on Women’s Entrepreneurship Development and Gender Equality (WEDGE) for assistance in effectively mainstreaming gender and the needs of women entrepreneurs in particular into the implementation of its SME Policy.

The ILO had earlier become the first organization of the United Nations’ system to introduce a “gender audit” to assess its own performance in making gender equality a reality, and putting noble principles and concepts into action. The ILO’s gender audit, and its practical tool-kit of methodologies and approaches, was adapted for the Tanzanian context to meet the challenges of assisting MSME support agencies and BDS providers to better serve the female segment of their small enterprise clients. The various tests of the materials, relating training programmes and actual audits of SME support agencies were seen to meet the needs of these agencies, as well as contribute to the implementation of the national SME Policy. During the programmes aimed at building the capacities of the SME support agencies, there was a strong indication that the sex of the business owner, rather than the size of the enterprise, was the most significant descriptor when it came to providing (supply-side) and accessing (demand-side) business support services. Thus the term “Female And Male Operated Small enterprises”, or FAMOS, was born.

Interest in this new approach has grown over the past couple of years, and it was decided to develop a generic FAMOS Guide as a form of gender-based service quality check for MSME support agencies.

This FAMOS Guide has been through many hands and benefited from comments from many quarters. The ILO would like to pay special mention to Dr Karin Reinprecht, ILO consultant, who led the ILO's response to meeting the request from the Tanzanian Government. She was ably assisted by the WEDGE Regional Technical Adviser, Ms Grania Mackie, who also contributed to testing the FAMOS approaches in Tanzania. The members of the SME Section in Tanzania played an enormous part in supporting and championing this innovative approach. They are Mr Mr Dessayant Massawe (Director), and Ms Consolatha Ishibabi, and Ms Jane Lyathu. The final product has been brought to fruition thanks to the continuing dedication of Mr Gerry Finnegan, former WED Senior Specialist in ILO Geneva, and now Director of the ILO Lusaka Office. Additional inputs were provided by Ms Smita Premchander, Eva Majurin, Ryoko Iisuka, as well as by colleagues from the ILO's Gender Bureau, and final publication was undertaken thanks to Ms Valeria Morra and colleagues in the ILO's International Training Centre, Turin, Italy.

The ILO wishes to acknowledge the continuing support provided from the Government of Ireland and its Irish Aid Programme for WEDGE activities in Africa and elsewhere.

Regina Amadi-Njoku  
Regional Director  
ILO Addis Abbaba

## INTRODUCTION

The ILO was the first UN organization to adopt a gender audit approach in order to self-assess its performance in relation to the promotion of gender equality and gender mainstreaming. In the process of developing the gender audit approach, the ILO adapted and developed a valuable set of practical tools and approaches. As the ILO's WEDGE team sought a rapid response to the challenge given to it by the Government of Tanzania and its SME Policy to assist with gender mainstreaming, the gender audit tool-kit proved to be a valuable and accessible asset.

The Government of Tanzania was aware that many of the public sector support programmes for MSMEs and private sector business development service providers were either ignoring or effectively not serving women entrepreneurs, as an important part of their potential client groups. The same was often the case for NGO programmes and/or donor-assisted programmes, unless they had a specific outreach to women as business owners.

This FAMOS Guide aims to facilitate business support agencies, financial institutions and government departments to have a fresh look – and a systematic assessment – of the extent to which they target and serve women entrepreneurs, their needs and their potentialities. It invites a thorough self-assessment of an organization's promotional efforts, staffing and human resource approaches and allocations, internal and external communications, and its formal and informal culture and ways of working, in order to determine its readiness to serve women entrepreneurs as clients. The FAMOS Guide also encourages the identification of practical, do-able, simple and effective responses that can help an organization have better outreach to female clients.

Ultimately, the FAMOS Guide promotes a “Win-Win situation”, within which women entrepreneurs win by being better served by the business support agencies, and the agencies in turn also win by learning more about serving a significant and growing sector of business clients, thus expanding their customer base and contributing to their overall business development in the long run.

**LIST OF ACRONYMS/ABBREVIATIONS**

<b>AIDS</b>	Acquired Immune Deficiency Syndrome
<b>BDS</b>	Business Development Services
<b>CV</b>	Curriculum vitae
<b>FAMOS</b>	Female And Male Operated Small enterprises
<b>HIV</b>	Human Immunodeficiency Virus
<b>LAP</b>	Logical Action Plan
<b>MFI</b>	Micro-Finance Institution
<b>MSME</b>	Micro, Small and Medium-Sized Enterprises
<b>RMA</b>	Rapid Market Appraisal
<b>SWOT</b>	Strengths, Weaknesses, Opportunities, Threats

## Part A – INTRODUCTION

1. Why FAMOS? .....	2
2. What is the FAMOS Check? .....	2
3. Who can use the FAMOS Check? .....	2
4. Why a self-check? .....	3
5. Why should an organization improve its services for FAMOS? .....	3
6. How to use the FAMOS Check Guide and Methods .....	3
7. How to do the FAMOS Check .....	7
8. What is the time-line for the FAMOS Check? .....	9

## Part B – THE FAMOS CHECK GUIDE FOR FACILITATORS

<b>TOPIC 1: CLIENTELE .....</b>	<b>13</b>
Check the organization's clients and beneficiaries: Does the organization actually have FAMOS as clients/beneficiaries? .....	14
<b>TOPIC 2: ACTIVITIES AND SERVICES .....</b>	<b>15</b>
Check the organization's activities/services: Are they appropriate for both Female And Male Operated Small enterprises? .....	16
<b>TOPIC 3: APPROACH AND OUTREACH .....</b>	<b>21</b>
Check the organization's approach: Does the approach really target both Female And Male Operated Small enterprises? .....	22
<b>TOPIC 4: PROCEDURES .....</b>	<b>25</b>
Check the organization and its procedures: Are the organization and its procedures adapted and focused for servicing FAMOS? .....	26
<b>TOPIC 5: RESOURCES .....</b>	<b>30</b>
Check the organization's resource base: Does the organization have sufficient resources for working with FAMOS? .....	31
<b>TOPIC 6: STRATEGIES .....</b>	<b>35</b>
Check the organization's strategies: Do the organization's strategies, plans and objectives highlight its work for FAMOS? .....	36

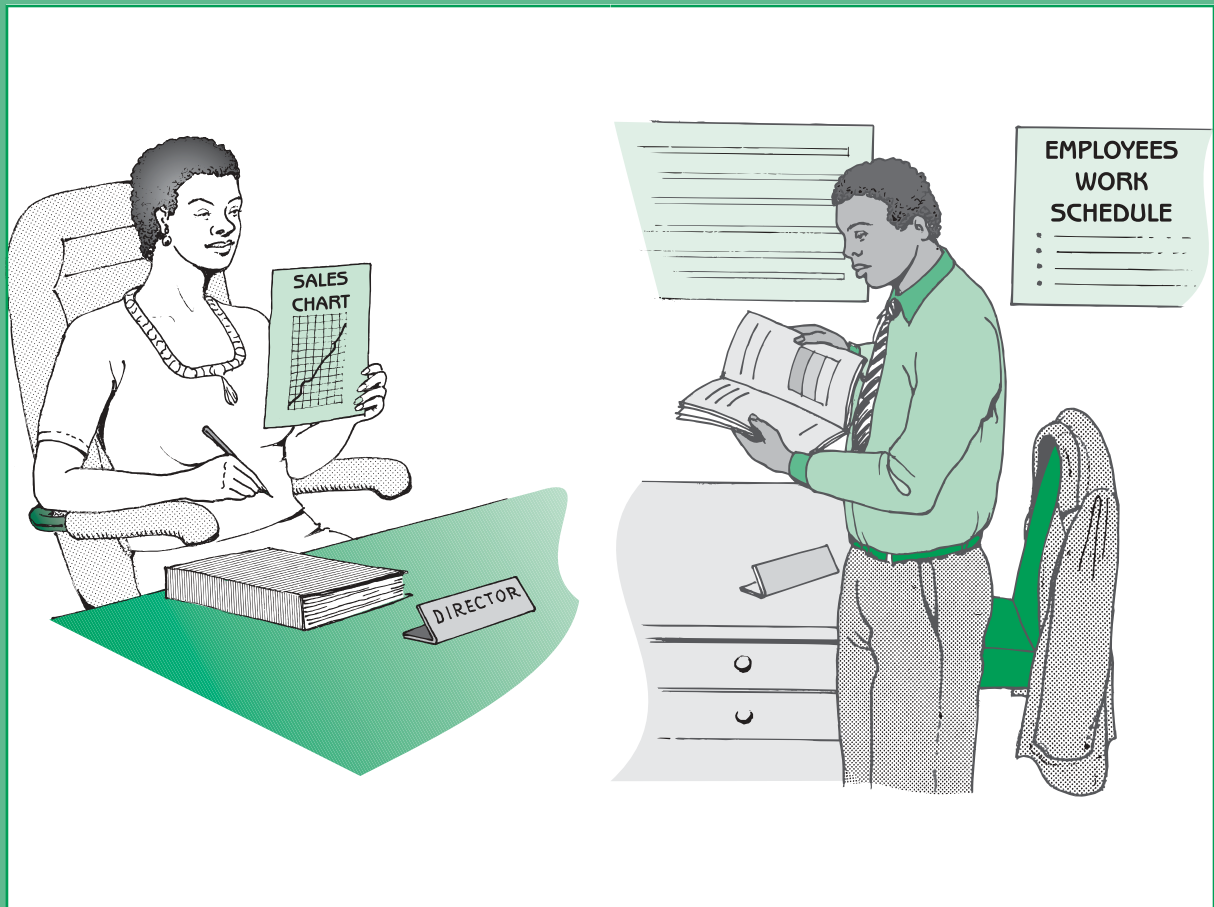
## Part C – METHODS USED IN PERFORMING THE FAMOS CHECK

HANDOUT 1:	Hofstede's Onion/Culture Check .....	40
HANDOUT 2:	Historical Time-line Exercise.....	48
HANDOUT 3:	FAMOS Knowledge and Awareness Quiz .....	51
HANDOUT 4:	Diamond Analysis .....	64
HANDOUT 5:	Chapati Diagram Analysis .....	68
HANDOUT 6:	SWOT Analysis .....	72
HANDOUT 7:	Mind-Mapping Exercise.....	77
HANDOUT 8:	Preparing Logical Action Plans.....	82
HANDOUT 9:	Document Analysis.....	87
HANDOUT 10:	Interview Methods.....	104
HANDOUT 11:	Feedback Session Guide .....	108
REFERENCES AND BIBLIOGRAPHY.....		112
APPENDIX – SUMMARY OF FAMOS CHECK .....		116



# Part A

## INTRODUCTION



### Part A – INTRODUCTION

#### 1. Why FAMOS?

Women entrepreneurs in many countries are playing an increasingly important role in employment creation and income generation, and this is contributing in a sustainable way to poverty reduction.

More often than not, the specific needs of women entrepreneurs are not reflected in strategies and services for supporting and developing micro, small and medium-sized enterprises (MSMEs). Women entrepreneurs as a group, their contributions, and their special business needs and requirements, are often overlooked. As a result, activities for MSME development tend to be gender-blind. The MSME sector is therefore referred to in this document as Female And Male Operated Small enterprises (FAMOS), so as to place more emphasis on the involvement and ownership of both women and men in enterprises, rather than on the size of the business.

This approach was first developed in response to requests from the Ministry of Industry and Trade in the United Republic of Tanzania. These materials are based on a number of pilot activities carried out by the ILO in that country.

#### 2. What is the FAMOS Check?

The FAMOS Check is a tool for doing a self-check of one's own organization. It is normally carried out by an internal team with support from external facilitators. The goal of the self-check is to identify opportunities for improvement in the way in which an organization reaches out to and serves both women and men, i.e. Female And Male Operated Small enterprises. The FAMOS Check explores these questions:

- Does the organization want to work for both Female And Male Operated Small enterprises?
- Does the organization actually work for FAMOS?
- How can the organization improve the way it works for FAMOS?

#### 3. Who can use the FAMOS Check?

The FAMOS Check is tailor-made for organizations which work for MSMEs, i.e. Female And Male Operated Small enterprises. The ultimate aim is to improve the organization's activities, services and outreach for FAMOS.

#### 4. Why a self-check?

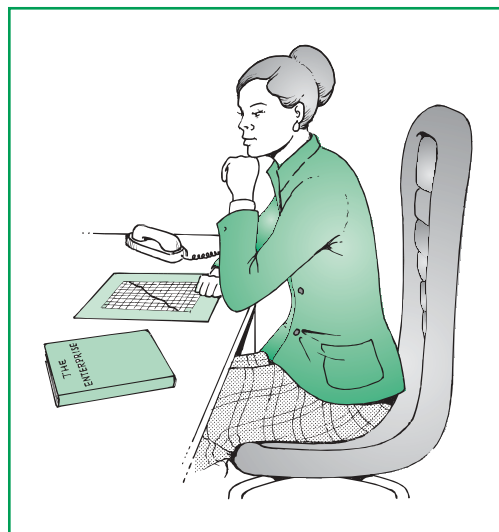
The self-check method is promoted on the premise that knowledge about possible ways of improving an organization is most likely to be found within the organization itself. The FAMOS self-check is one way in which an organization can collect and consolidate the ideas of its employees and managers, and these contributions can have a significant impact in bringing about innovations and improvements within the organization.

#### 5. Why should an organization improve its services for FAMOS?

FAMOS (i.e. MSMEs) are globally, and often nationally, the most important vehicle for economic development. In total, they provide more new job opportunities per year than large enterprises. For example, in the United Republic of Tanzania over 1 million<sup>11</sup> MSMEs provide between 3 and 4 million jobs (about 20-30% of the total labour force) and contribute approximately 35%-40% of the national Gross Domestic Product (GDP).

#### 6. How to use the FAMOS Check Guide and Methods

The FAMOS Check is a guide for facilitators. It begins with an introduction (Part A). This is followed by a section on key topics (Part B). Part B covers six topics, each of which consists of a set of questions and references to appropriate methods for analysing them. A third section, Part C, introduces the methods used in the FAMOS Check. Part C sets out the objectives and gives instructions for using each of the suggested methods, and offers helpful tips for the facilitator.



1 Estimated numbers cited here are taken from "Women Entrepreneurs in the United Republic of Tanzania", ILO/SEED, Dar-es-Salaam, October 2002.

By way of an overview, the six main topics that constitute Part B of the self-check are listed below:

### Clientele



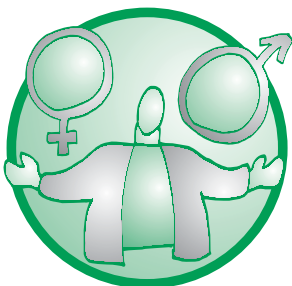
Does the organization actually have Female And Male Operated Small enterprises (FAMOS) as clients/beneficiaries?

### Activities and Services



Are the organization's activities appropriate for meeting the needs of FAMOS enterprises?

### Approach and Outreach



Does the organization's approach effectively target **both** Female And Male Operated Small enterprises?

### Procedures



Are the organization and its procedures appropriate for servicing FAMOS?

---

**Resources**

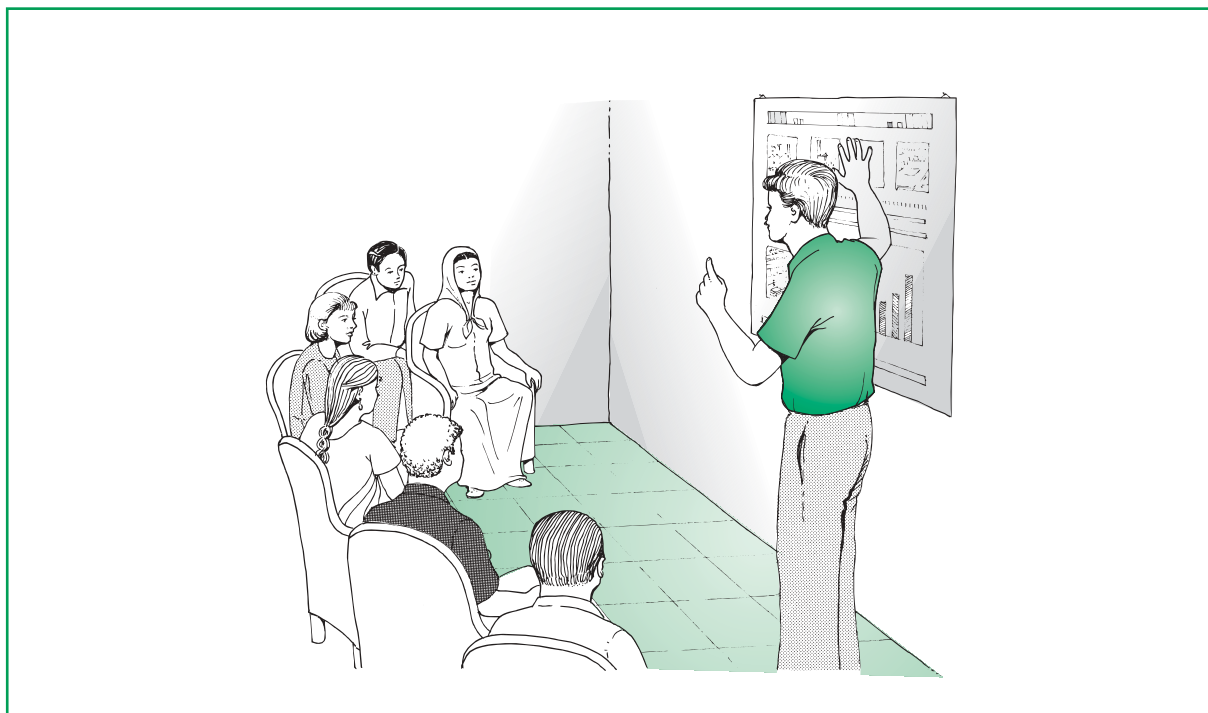
Does the organization have sufficient resources for working with FAMOS?

---

**Strategies**

Do the organization's strategies, plans and objectives specifically mention work done for FAMOS?

The answers to these key questions will be reflected partly in the organization's written documents, partly in the attitudes and actions of its employees and managers. The views of FAMOS clients and people outside the organization are a valuable additional source of input in carrying out the FAMOS Check.



Part C describes four main methods:

### Workshops



These are intended for employees, managers and FAMOS clients. Part C introduces and illustrates nine different workshop tools.

### Document analysis



The relevant documents used by the organization are analysed here.

### Interviews



Interviews are conducted with key or representative employees, managers and FAMOS clients.

### Feedback



The outcome of the self-check is fed back to the organization in a final wrap-up session and report. It is also recommended that a review or update be carried out after one year, to help in analysing the implementation of any subsequent changes.

**Tips for facilitators****Recommended Methods**

Parts B and C should be used together, since the questions under each topic in Part B cross-refer to the relevant method(s) in Part C. However, these are only recommendations, and facilitators are free to use additional methods of their own choosing not covered in this manual. When using methods other than those described in the handouts, care should be taken to ensure that they are appropriate and fit in with the context, as well as with the overall purpose, of the FAMOS Check. Time limitations also need to be considered, and work should be planned and implemented within a reasonable and achievable time-frame.

## 7. How to do the FAMOS Check

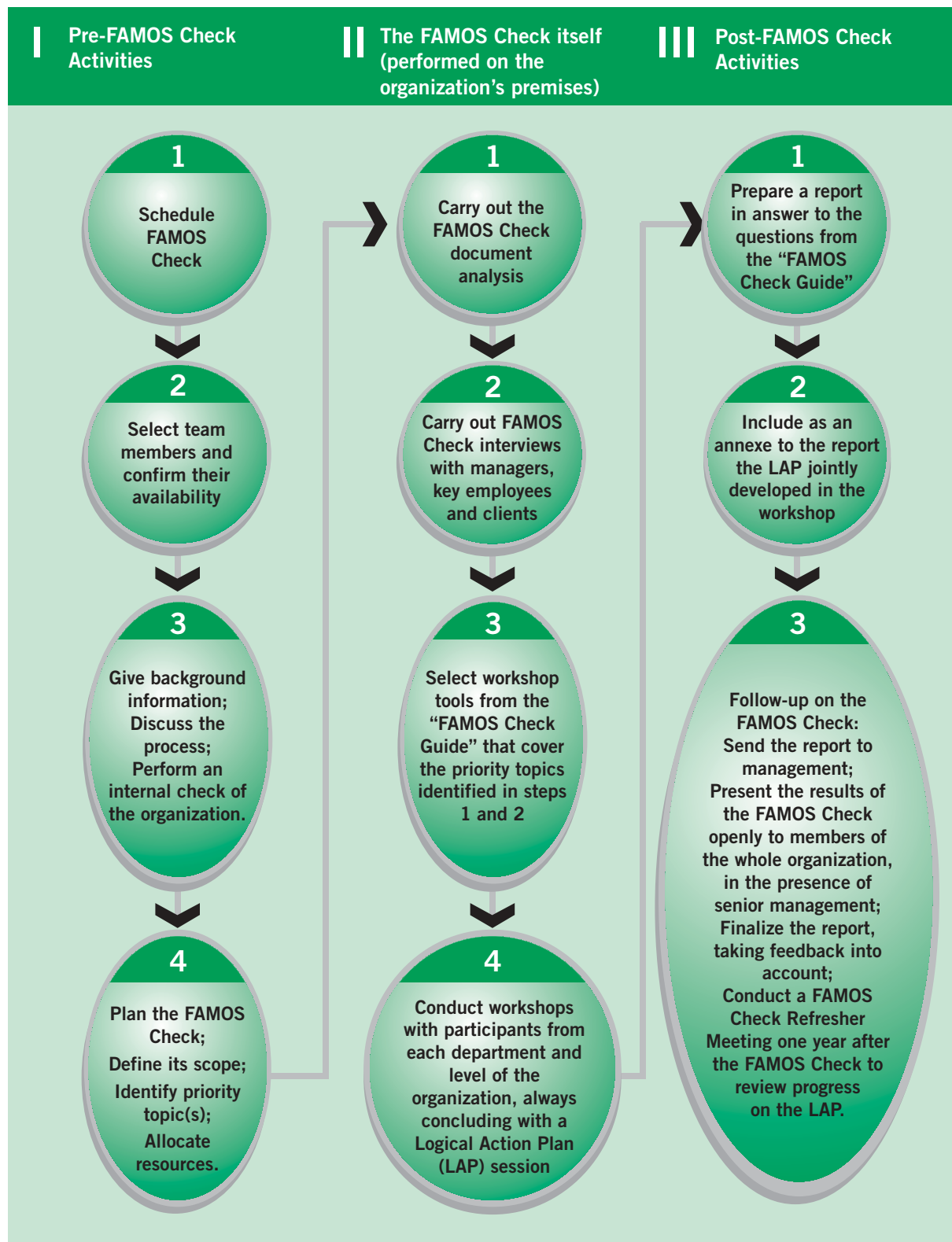
This session describes how to get started with the FAMOS Check, how to choose the right methods and how to achieve the best results. There are three phases to the FAMOS Check process:

- (I) Pre-FAMOS Check activities;
- (II) the FAMOS Check itself; and
- (III) Post-FAMOS Check activities.

■ The Pre-FAMOS Check activities constitute the planning phase. They are intended to (a) develop teams which can participate in and facilitate the process, (b) provide orientation to the organization, (c) synchronize schedules and dates, and (d) plan the topics, scale and budget of the FAMOS Check.

- ➔ The FAMOS Check team of 2-3 people should include those with expertise in the fields of enterprise, gender, and general aspects of human resource management, with good analytical skills.
- ➔ Preferably, a team conducting the FAMOS Check should consist of both women and men. The team should include some experienced trainers.
- ➔ The daily schedule should detail the key issues to be considered at each step of the process, and the appropriate methods for obtaining the relevant information.
- ➔ The resources and time required for using each of the methods must be planned for.

## The FAMOS Check Process





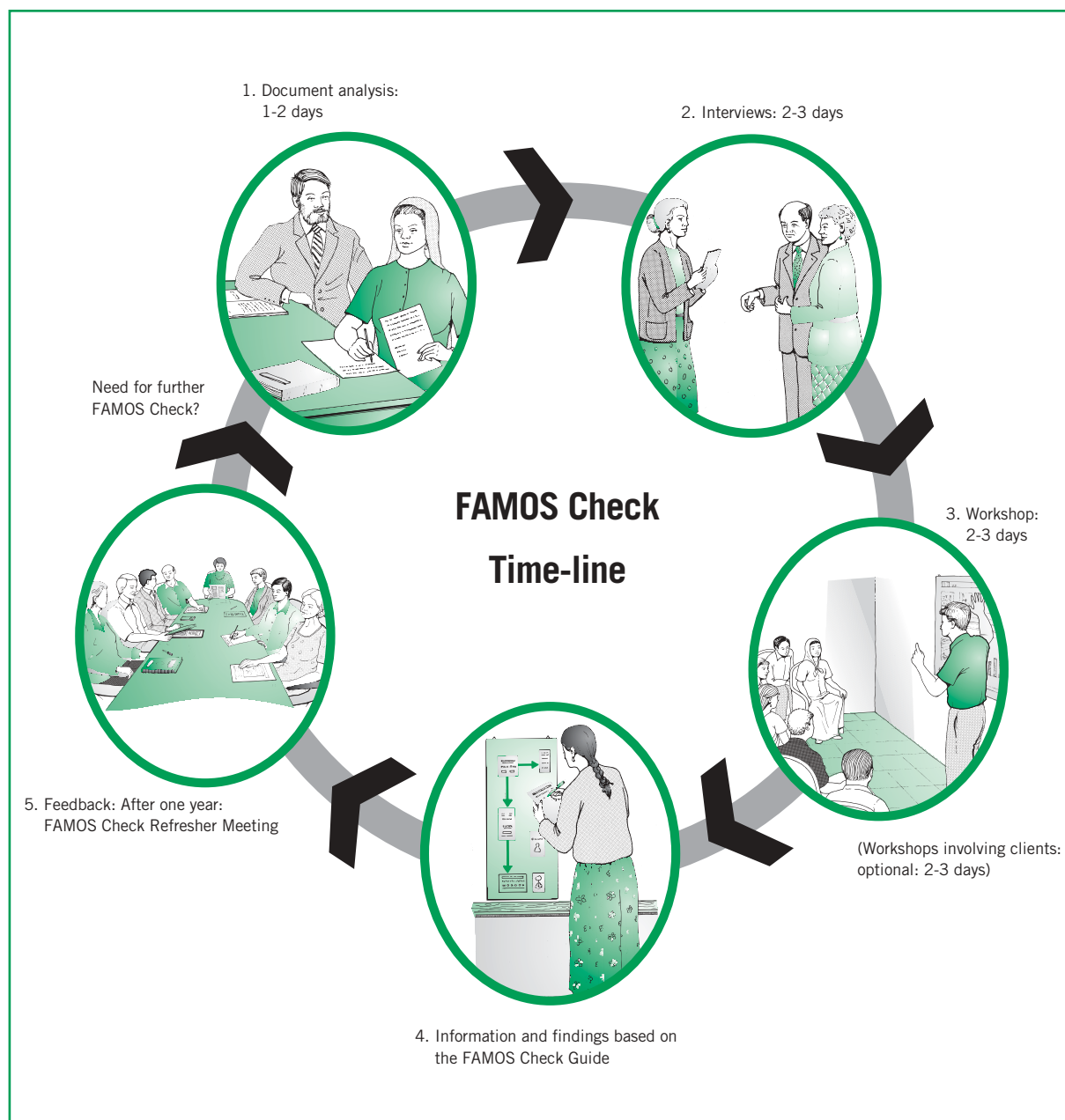
- The FAMOS Check addresses various issues using four main methods as shown on page 6: workshops, document analysis, interviews and feedback, and culminating in LAPs. The FAMOS Check time-line is described in greater detail on page 9. The Post-FAMOS Check activities recommended here are based on the three points set out on page 8:
  - (a) Once the FAMOS Check activities are concluded, the trainers write a report, summarizing and analysing the information and responses derived from the FAMOS Check. The report needs to include a Logical Action Plan (LAP) and a time-line for follow-up activities.
  - (b) The FAMOS Check report is then sent to both management and staff for comment. The revised version of the report, incorporating the comments received, is sent once again to the same groups of people, at least three days before the final Feedback Workshop.
  - (c) A Feedback Workshop (explained in the Feedback Session Guide – Handout 11) should be held. A list of the major decisions that need to be taken by the management of the organization should be drawn up and included in the report. At the end of the workshop, the dates for the FAMOS Check refresher meeting should be confirmed with the management and staff, and included in the report.
  - (d) The report should be revised to take into account the comments received during the workshop. It is then formally submitted to the organization.
  - (e) Finally, within a maximum period of one year of the Feedback Workshop, and in line with implementation of the LAP, a FAMOS Check refresher meeting should be organized (see FAMOS Check refresher meeting – Handout 11).

## 8. What is the time-line for the FAMOS Check?

Depending on the size of the organization and the availability of interviewees, the actual FAMOS Check (excluding Pre- and Post-Check activities) generally lasts five to seven working days. The document analysis normally takes one or two days, the interviews two to three days, and the workshop is usually spread over two to three days. A report is then prepared, based on the FAMOS Check Guide; it should include a copy of the LAP.

One year later, a FAMOS Check refresher meeting needs to be held to monitor progress in implementing the Logical Action Plan.

If workshops are held with FAMOS clients (Female And Male Operated Small enterprises or MSMEs) to find out more about their views and suggestions, the FAMOS Check could take longer.









# Part B

## THE FAMOS CHECK GUIDE FOR FACILITATORS



## Part B – THE FAMOS CHECK GUIDE FOR FACILITATORS

This section details the six main topics that are covered in an organization's self-check, conducted using the FAMOS Check process. The self-check includes a set of questions relating to each topic. Each set of questions is accompanied by recommended methods that will help in exploring each of the topics under consideration. The methods are referenced by handout number, and are listed in Part C of the FAMOS Check Guide.

Topic 1		Clientele	Topic 4		Procedures
Topic 2		Activities and Services	Topic 5		Resources
Topic 3		Approach and Outreach	Topic 6		Strategies

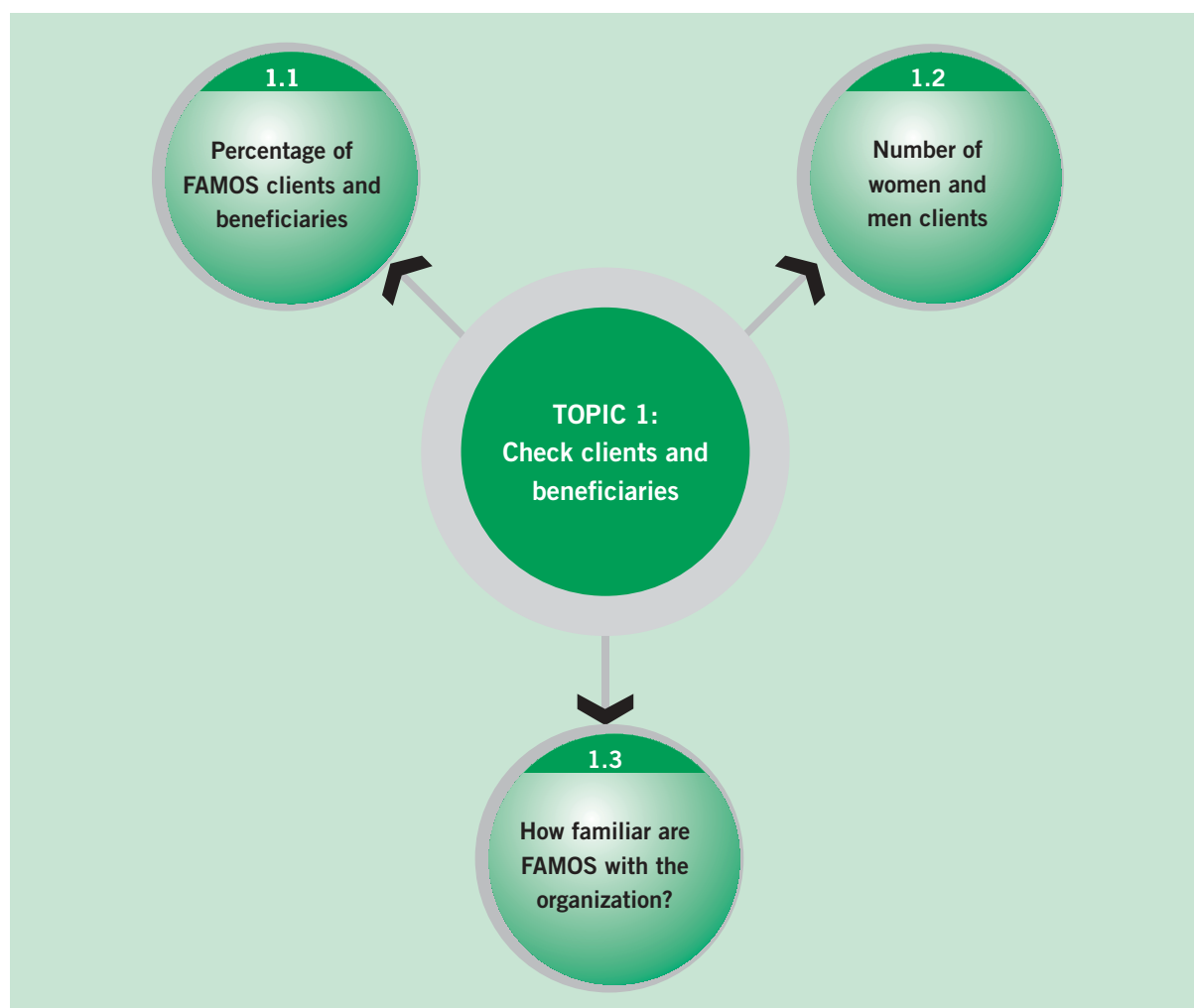
These topics are explained in the following pages.



### Tip for facilitators

Where questions require "yes/no" answers, as far as possible the reasons for the response should also be sought.

## Topic 1: Clientele



### Topic 1

### Check the organization's clients and beneficiaries: Does the organization actually have FAMOS as clients/beneficiaries?

■ Questions to be asked (some of which will involve interviews with clients/beneficiaries):

- 1.1 What percentage of the organization's overall clientele consists of FAMOS clients and beneficiaries? Is it above or below 30%?
- 1.2 What proportion of FAMOS clients/beneficiaries are women and men respectively? What sector(s) do they operate in? What is the size of their enterprise (MSME)?
- 1.3 How familiar are FAMOS with the organization? Is the organization well known to FAMOS within its area of operation (locally and nationally)?
  - ➔ Is there general awareness of the organization?
  - ➔ Are the services provided by the organization also known about?
  - ➔ Are men more likely than women to know about the organization and vice versa?
  - ➔ Are men more likely than women to know about the services the organization provides and vice versa?
  - ➔ Do only business people know about the organization, or is it also known to the general public?

#### Recommended methods



##### Document analysis:

- Strategy and policy documents



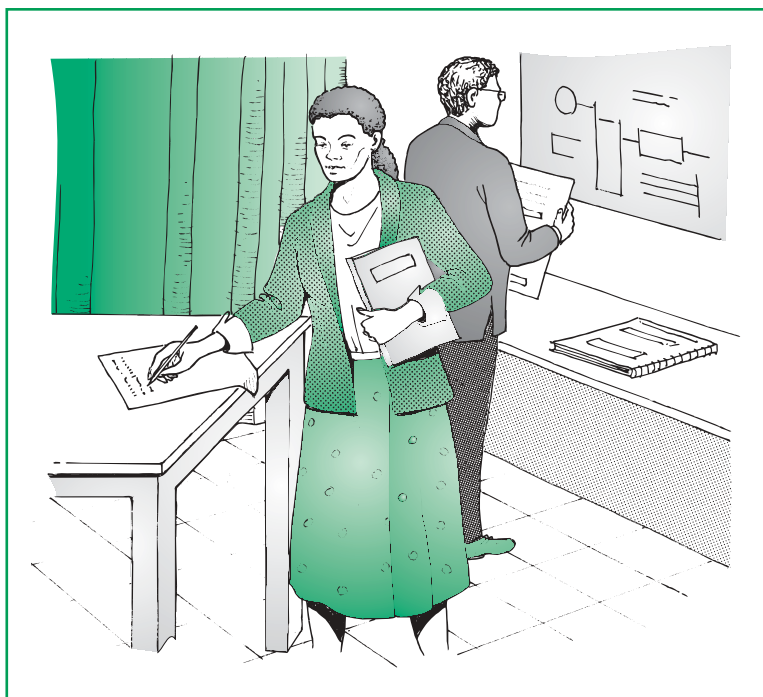
##### Interviews:

- Key clients
- Key employees

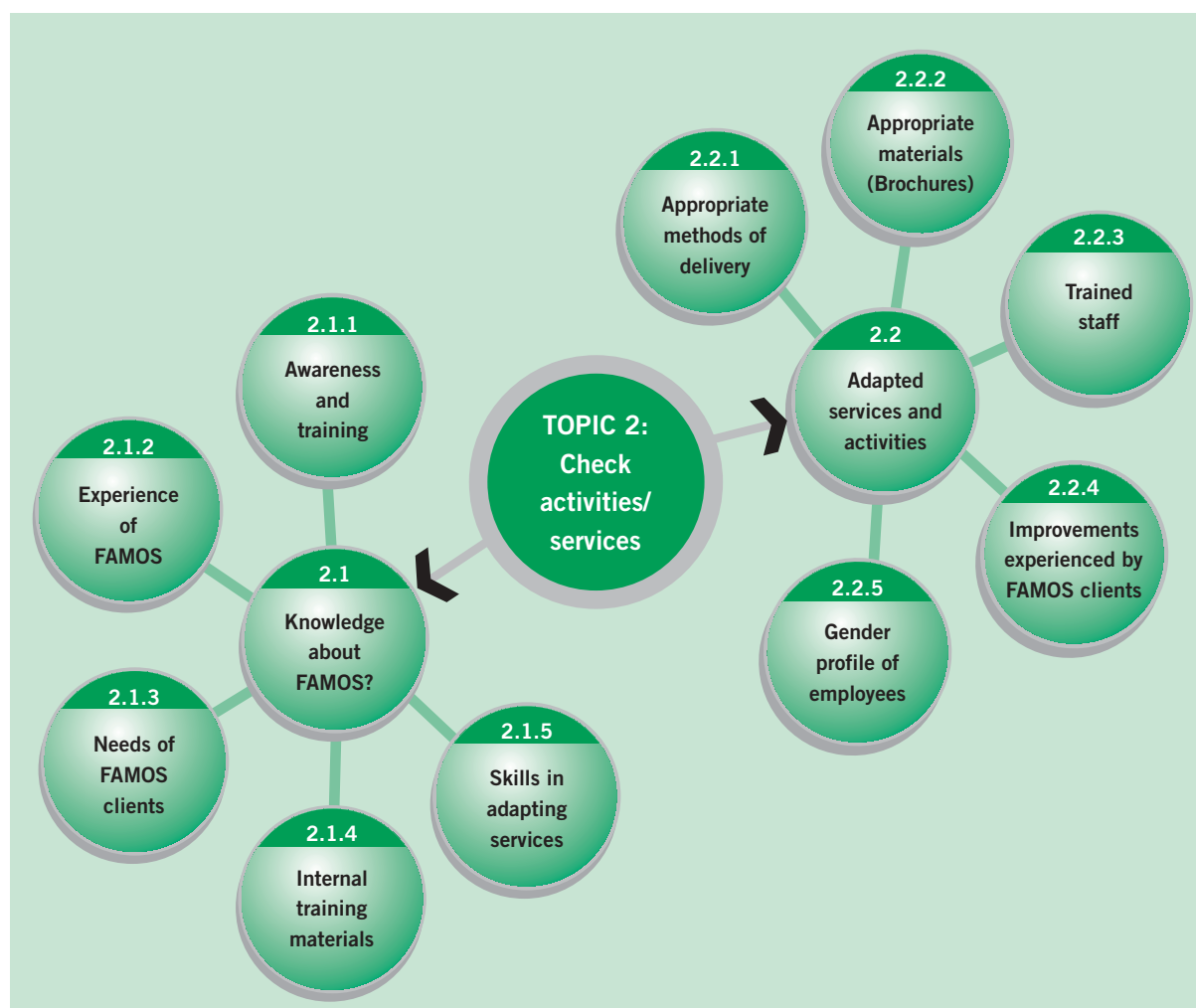


##### Workshop methods:

- Diamond analysis
- Chapati diagram



## Topic 2: Activities and Services





### Topic 2

### Check the organization's activities/services: Are they appropriate for both Female And Male Operated Small enterprises?

#### ■ Questions to be asked:


2.1 Does the organization have sufficient knowledge of FAMOS?

2.1.1 Do staff in the organization have awareness of and training in servicing FAMOS clients?



**Recommended methods**

- Document analysis:**
  - CVs of key employees
  - Policy and strategy documents
- Interviews:**
  - Key employees
  - Managers
- Workshop methods:**
  - Historical time-line



**Recommended methods**

- Document analysis:**
  - CVs
  - Policy and strategy documents
- Interviews:**
  - Key employees
  - Managers
- Workshop methods:**
  - FAMOS Quiz to set the stage
  - Culture check (Hofstede's Onion)
  - Time-line

2.1.2 Do those employed in the organization have experience in working with FAMOS?

- ➔ Are the staff aware of the particular opportunities and barriers facing women entrepreneurs?
- ➔ Do the organization's staff recognize and understand the various opportunities and barriers specific to different sizes of FAMOS (i.e. micro, small, medium)?
- ➔ Do staff in the organization recognize and understand the opportunities and barriers specific to FAMOS operating in different sectors (e.g. the agro-processing sector)?
- ➔ Do staff in the organization know how many women and men are working with FAMOS within the organization?



**Recommended methods**

**Document analysis:**

- CVs
- Policy and strategy documents

**Interviews:**

- Key employees
- Managers

**Workshop methods:**

- Historical time-line
- FAMOS Knowledge and Awareness Quiz

2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?

- ➔ Are participatory methods used for assessing needs and markets?
- ➔ Are the specific problems of FAMOS understood and addressed?
- ➔ Are FAMOS clients supported in reaching their business goals?
- ➔ Does the organization try to meet demand based on the needs perceived?

**Recommended methods**

**Document analysis:**

- Training materials
- Promotional materials and brochures for FAMOS

**Interviews:**

- Key employees
- Managers

**Workshop methods:**

- SWOT analysis

2.1.4 Is the organization's expertise in working with FAMOS reflected in its internal training materials?

- ➔ Are the barriers that women and men entrepreneurs face taken into account in the organization's internal training materials (including barriers related to sector, size and stage in the life cycle of the business)?
- ➔ Through the activities and services offered by the organization, does it propose and offer solutions?
- ➔ Are the solutions proposed based on the specific problems experienced by (a) female- and (b) male-operated small enterprises?



2.1.5 Do the organization's staff know how to adapt its activities and services to FAMOS clients?

- ➔ Are problem-solving approaches to issues facing FAMOS known and developed by the organization's staff?
- ➔ Does the organization's management propose ways of solving the problems of FAMOS? How feasible are these proposals, and have they been adopted?
- ➔ Are problem analysis methods known and applied in the organization?



**Recommended methods**



**Interviews:**

- Key employees
- Managers




**Workshop methods:**

- FAMOS Quiz
- Diamond analysis


2.2 Have staff in the organization adapted activities and services for FAMOS?

2.2.1 Are the organization's methods of delivering support services appropriate for FAMOS clients?

- ➔ Are the methods of delivery appropriate for:
  - Women and/or men entrepreneurs?
  - Micro, small and/or medium-sized enterprises?
  - All sectors or selected sectors?
- ➔ Are the communications methods, materials, and channels appropriate for FAMOS? Are communications understood by the enterprise/entrepreneur categories shown above?




**Recommended methods**



**Interviews:**

- Key FAMOS clients (in groups)



**Workshop methods:**

- SWOT analysis for services (if possible with the participation of FAMOS clients)
- Diamond analysis

2.2.2 Is the organization's expertise reflected in the promotional materials and brochures it hands out to FAMOS?


- ➔ Are the promotional materials for FAMOS easily understood by clients?
- ➔ Can the materials be used easily by these FAMOS clients?



2.2.3 Does the organization have trained staff and technical expertise for the activities and services it provides to FAMOS clients?


- ➔ Are the organization's employees trained to provide its services to FAMOS?
- ➔ Do they have experience in implementing activities and services in relation to FAMOS?
- ➔ Do the organization's employees specialize (as a result of education, training or experience) in one of the activities or services offered to FAMOS?

Recommended methods




**Document analysis:**

- CVs



**Workshop methods:**

- SWOT analysis for service know-how



**Recommended methods**

**Document analysis:**

- The organization's handbooks and procedures
- Brochures on services

**Interviews:**


- Key employees
- Managers
- FAMOS clients

**Workshop methods:**

- Mind map on feedback from clients

2.2.4 Have FAMOS clients experienced improvements in their businesses resulting from the organization's activities and services (including follow-up evaluation, after-sales service)?

- ➔ Is there any follow-up evaluation after the organization's activities or services have been offered/provided to FAMOS?
- ➔ Does the organization provide any kind of after-sales support service for FAMOS?
- ➔ Does feedback from FAMOS clients reach the organization's employees and managers, e.g. on the quality of the activities and services?
- ➔ Is this information from FAMOS clients used to improve the organization's activities and services?
- ➔ Does the organization have FAMOS clients who come back regularly to request further activities and services?



**Recommended methods**

**Document analysis:**

- CVs
- Service delivery schedules

**Interviews:**

- Key employees
- Managers

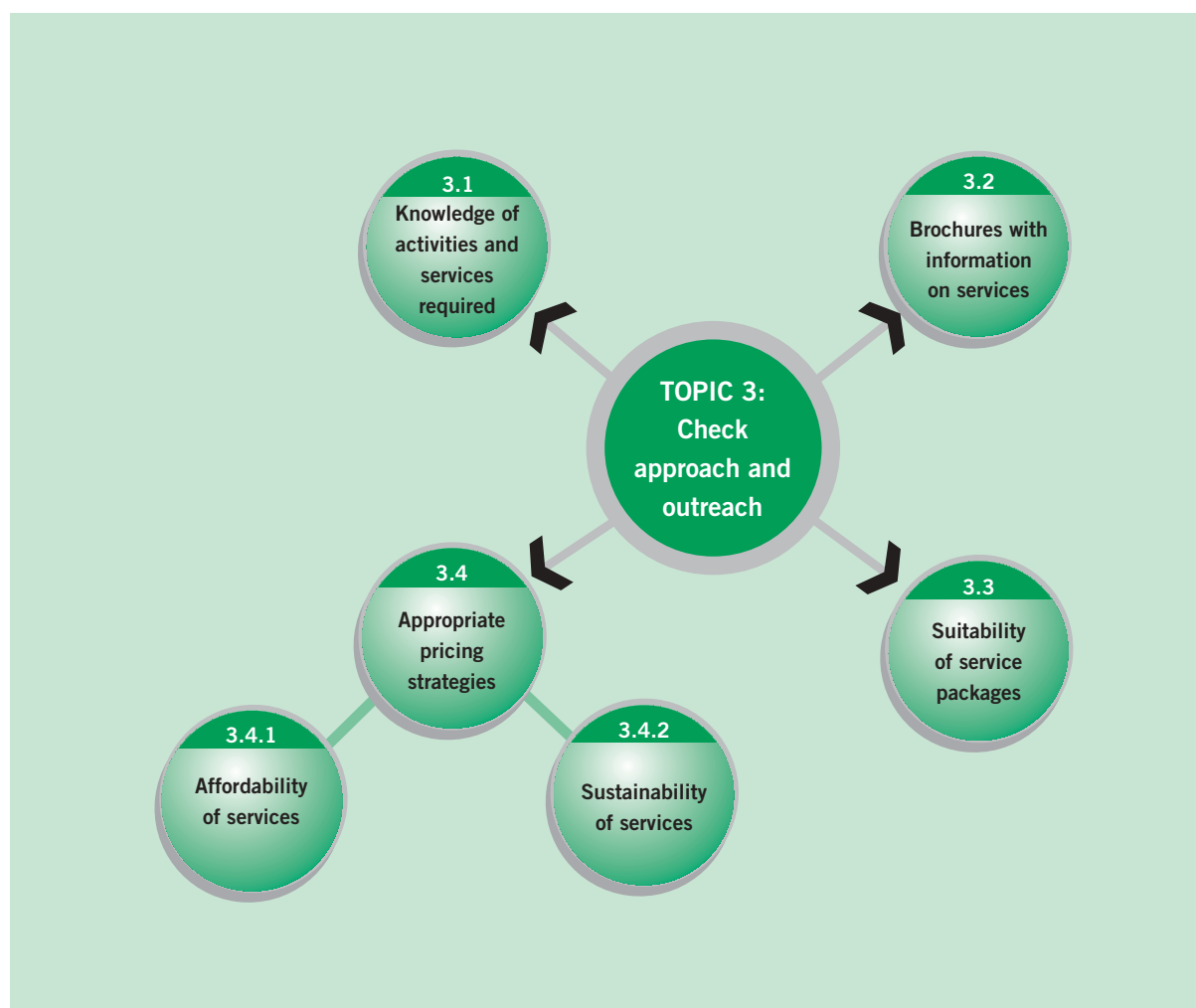
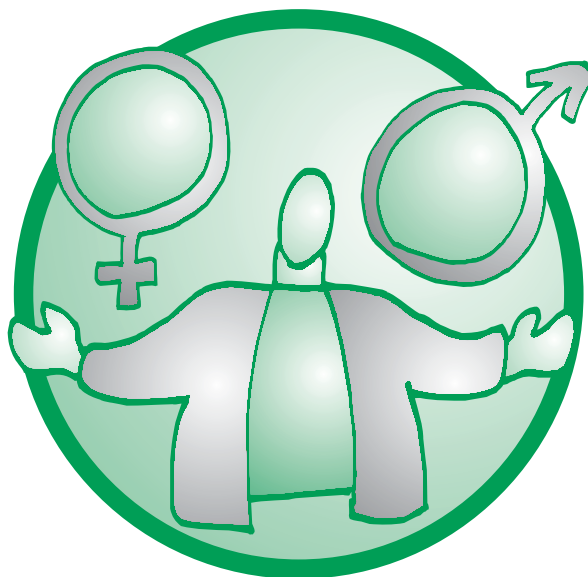
**Workshop methods:**

- Culture check (Hofstede's Onion)
- Time-line

2.2.5 Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?

- ➔ How many of the organization's staff are women?
- ➔ How many managers are female and how many male?
- ➔ Do the female employees provide professional assistance to female and male clients alike?
- ➔ Do both male and female employees specialize in supporting women entrepreneurs?

## Topic 3: Approach and Outreach



### Topic 3

### Check the organization's approach: Does the approach really target both Female And Male Operated Small enterprises?

#### ■ Questions to be asked:

3.1 Does the organization know what activities and services are required by both Female and Male Operated Small enterprises?

#### Recommended methods



##### Document analysis:

- The organization's handbooks and procedures



##### Interviews:

- Key employees
- Managers



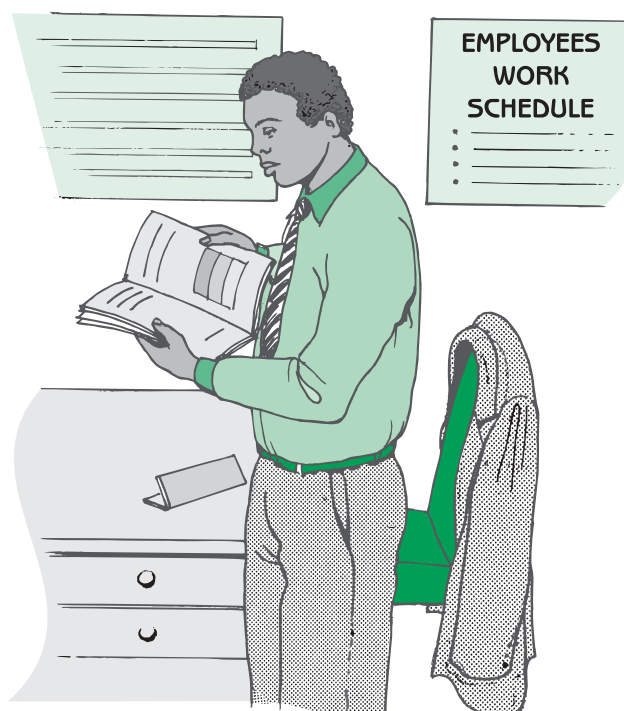
##### Workshop methods:

- SWOT analysis
- Mind-mapping

- ➔ Does the organization carry out market assessments (e.g. ILO's Rapid Market Appraisal) to ensure that research, analysis and presentation of information about FAMOS are timely, relevant, understandable and applicable?
- ➔ Can the organization identify the services required by FAMOS clients?
- ➔ Does the organization use client feedback systems?
- ➔ Does the organization have procedures to encourage innovation in approach, outreach, activity and service?
- ➔ Does the organization encourage employees of all ages and all hierarchical levels to suggest improvements, and to get involved in testing new ideas?

#### Tip for facilitators

Not all the questions set out here are appropriate for every organization. The relevance of the questions may depend on whether the organization is in the public or private sector. Some public-sector organizations may find that they have little opportunity or expertise for doing market surveys.





### 3.2 Are the brochures and other information on the organization's services suitable for and appealing to FAMOS clients?

#### Recommended methods


**Document analysis:**

- Brochures for FAMOS


**Interviews:**

- Key clients


**Workshop methods:**

- SWOT analysis

- ➔ Does the organization explain its approach (how it wants to assist FAMOS) in a way that enables FAMOS clients to make the right choices regarding the activities and services that they need and want?
- ➔ Do the brochures illustrate the promotional and business development messages in a way that is meaningful to FAMOS clients?



### 3.3 Are the organization's service packages suitable for FAMOS clients?

#### Recommended methods


**Document analysis:**

- Service documents


**Interviews:**

- Key employees
- Managers
- Key clients



**Workshop methods:**

- Mind-mapping
- SWOT analysis

- ➔ Does the organization package its services in a way that is useful to its FAMOS clients?
- ➔ Does the organization know what impact its service packages have on the performance of its FAMOS clients (see also question 2.2.4), e.g. increase in profits and sales; reduction in costs; increase in company assets; increase in jobs created, etc.?
- ➔ Does the organization change or modify its services regularly to meet the changing requirements of FAMOS clients?
- ➔ Does the organization have “vertically” and “horizontally” integrated services?

### 3.4 Are the organization's pricing strategies appropriate for FAMOS clients?

#### 3.4.1 Can FAMOS clients afford the prices charged by the organization?



**Recommended methods**

- Document analysis:**
  - Service documents
- Interviews:**
  - Key employees
  - Managers
  - Key clients
- Workshop methods:**
  - Mind-mapping
  - SWOT analysis

- ➔ Does the organization package its services so that FAMOS clients can easily afford them?
- ➔ Does the organization offer flexible payment terms and systems?
- ➔ Does the organization have a clear pricing strategy that encourages FAMOS clients to purchase its services?
- ➔ Does the organization have different pricing strategies for different groups or segments of FAMOS?

#### 3.4.2 Are the organization's activities and services financially sustainable, considering the prices charged?



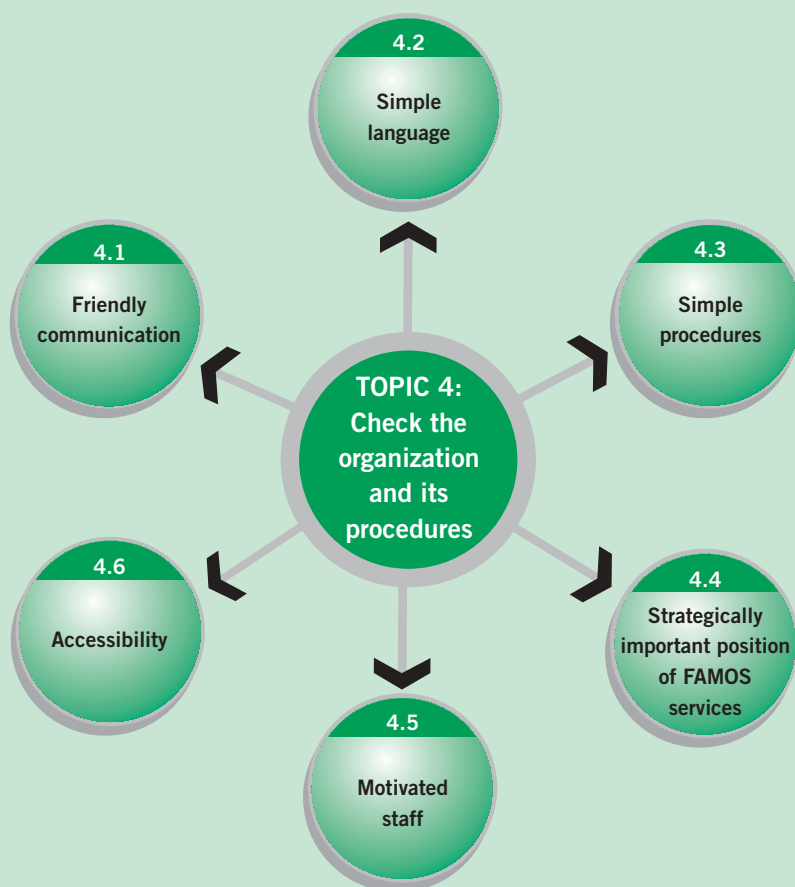
**Recommended methods**

- Document analysis:**
  - Financial documents
- Interviews:**
  - Key employees
  - Managers
  - Key clients
- Workshop methods:**
  - Mind-mapping
  - SWOT analysis

- ➔ Does the organization have pricing strategies (e.g. high volume/low price, or low volume/high price)?
- ➔ Are the organization's current pricing strategies sustainable (i.e. at least covering the organization's costs, and perhaps generating some profit), or does it plan to introduce sustainable pricing strategies in the future?
- ➔ Does the organization cross-subsidize its FAMOS services (e.g. by charging more for services delivered to larger enterprises or the public sector)?



## Topic 4: Procedures



### Topic 4

### Check the organization and its procedures: Are the organization and its procedures adapted and focused for servicing FAMOS?

#### ■ Questions to be asked:

#### 4.1 Is communication with FAMOS clients friendly?

##### Recommended methods



##### Document analysis:

- The organization's handbooks and procedures
- On-the-spot observations



##### Interviews:

- Key employees
- Managers
- Key clients



##### Workshop methods:

- Diamond analysis
- Culture check (Hofstede's Onion)
- Time-line analysis

- ➔ Do all staff in the organization know how to behave towards FAMOS clients (women, men; small/large enterprises; people with disabilities; people living with HIV and AIDS; people from different ethnic groups, etc.)? Have all staff (including security personnel) received training to develop correct attitudes towards FAMOS clients?
- ➔ Do the organization's service providers understand the circumstances in which their FAMOS clients live and work?
- ➔ Does the organization consciously promote the values of respect and tolerance?
- ➔ Is the dress code of employees appropriate for the organization's FAMOS clients?
- ➔ Are the buildings welcoming or unwelcoming to FAMOS clients?

#### 4.2 Is simple language used in the organization's documents and training materials? — and is it inclusive of both women and men?

##### Recommended methods



##### Document analysis:

- CVs
- Materials and brochures for FAMOS



##### Interviews:

- Key FAMOS clients (in groups)



##### Workshop methods:

- Historical time-line
- Diamond analysis (information and service materials, one-to-one communication, workshop language)

- ➔ Are the staff trained to express themselves and communicate clearly, and do they adapt their language according to their clients' needs/preferences?
- ➔ Is the language used by the staff in everyday interaction "gender neutral", or does it make specific reference to both women and men?
- ➔ Do the training materials use clear and simple language, pictures, graphics, etc.?
- ➔ Does the organization use a variety of means to communicate its messages clearly?



### Recommended methods

**Document analysis:**

- The organization's handbooks and procedures
- On-the-spot observation

**Interviews:**

- Key FAMOS clients (in groups)

**Workshop methods:**

- SWOT analysis of the organization's procedures



### Recommended methods

**Document analysis:**

- The organization's handbook and procedures

**Interviews:**

- Key employees
- Managers

**Workshop methods:**

- Culture check (Hofstede's Onion)
- Time-line



#### 4.3 Are the organization's procedures simple?

- ➔ Is it clear to FAMOS clients and people outside the organization as to whom they should contact in the organization, and for what purpose?
- ➔ Are the structures and procedures of the organization clear and transparent to its FAMOS clients?

#### 4.4 Do FAMOS services have sufficient status and importance within the organization? – and is this reflected at the strategic level?

- ➔ Does the organization have enough staff to effectively deliver its services to FAMOS clients?
- ➔ Do the relevant heads of department have enough authority and resources to be able to implement appropriate activities and services for FAMOS clients?
- ➔ Does the organization have enough physical space and work materials to deliver its services to FAMOS clients?

4.5 Are the organization's staff motivated to work with FAMOS clients?

- ➔ What motivates the organization's employees, managers and co-workers? Is it their ideals; a good salary; a desire to maintain the organization's reputation; a strong interest in FAMOS, etc.?
- ➔ Does the organization have incentive systems (financial and non-financial) to motivate its staff to work specifically with FAMOS?



### Recommended methods



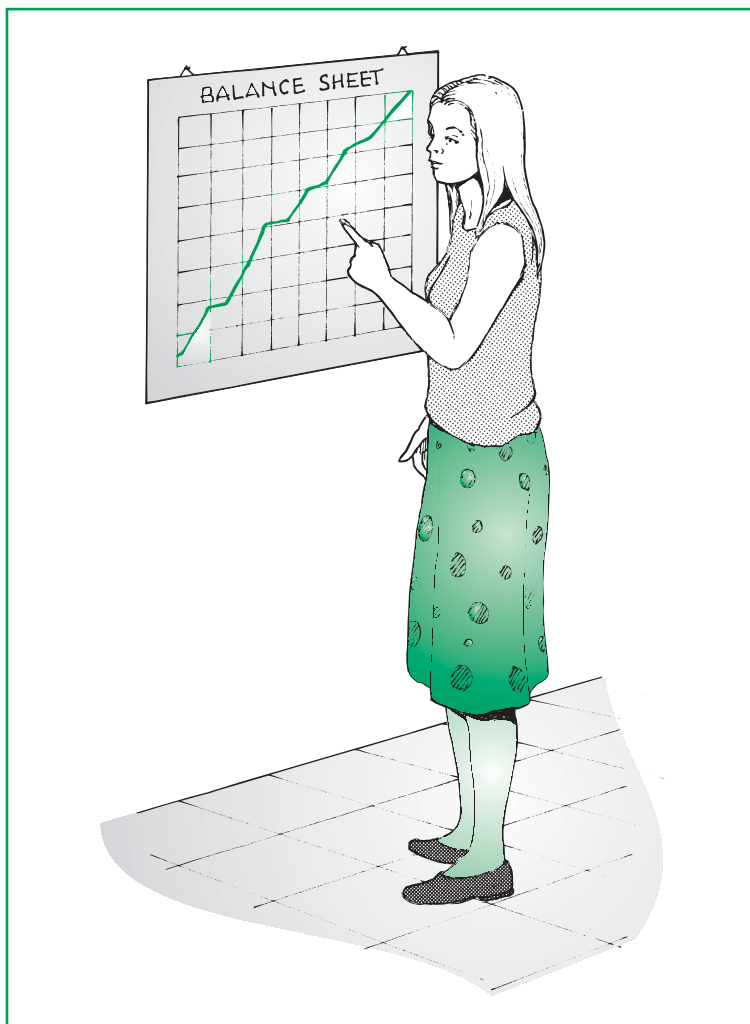
#### Interviews:

- Key employees
- Managers



#### Workshop methods:

- Culture check (Hofstede's Onion)
- Time-line



## 4.6 Is the organization accessible for FAMOS?

## Recommended methods

**Document analysis:**

- The organization's handbook and procedures (especially access and entry requirements)

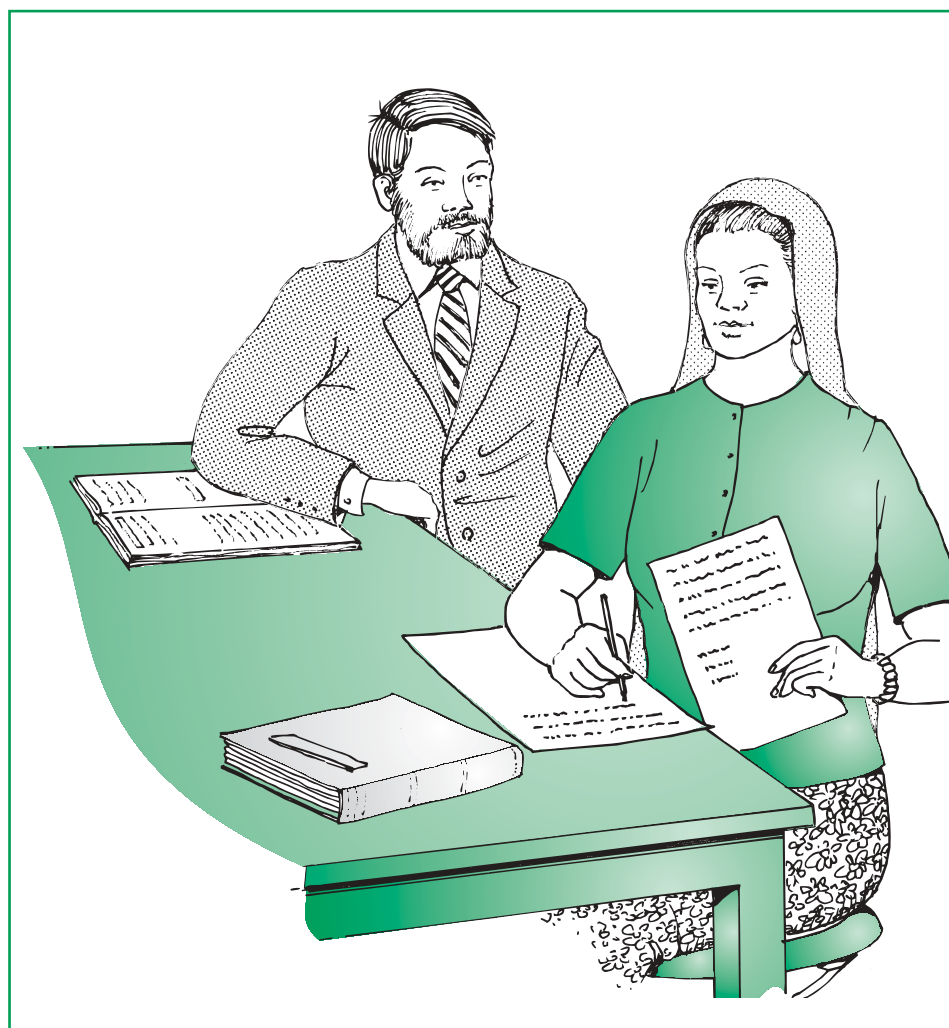
**Interviews:**

- FAMOS clients (in groups)

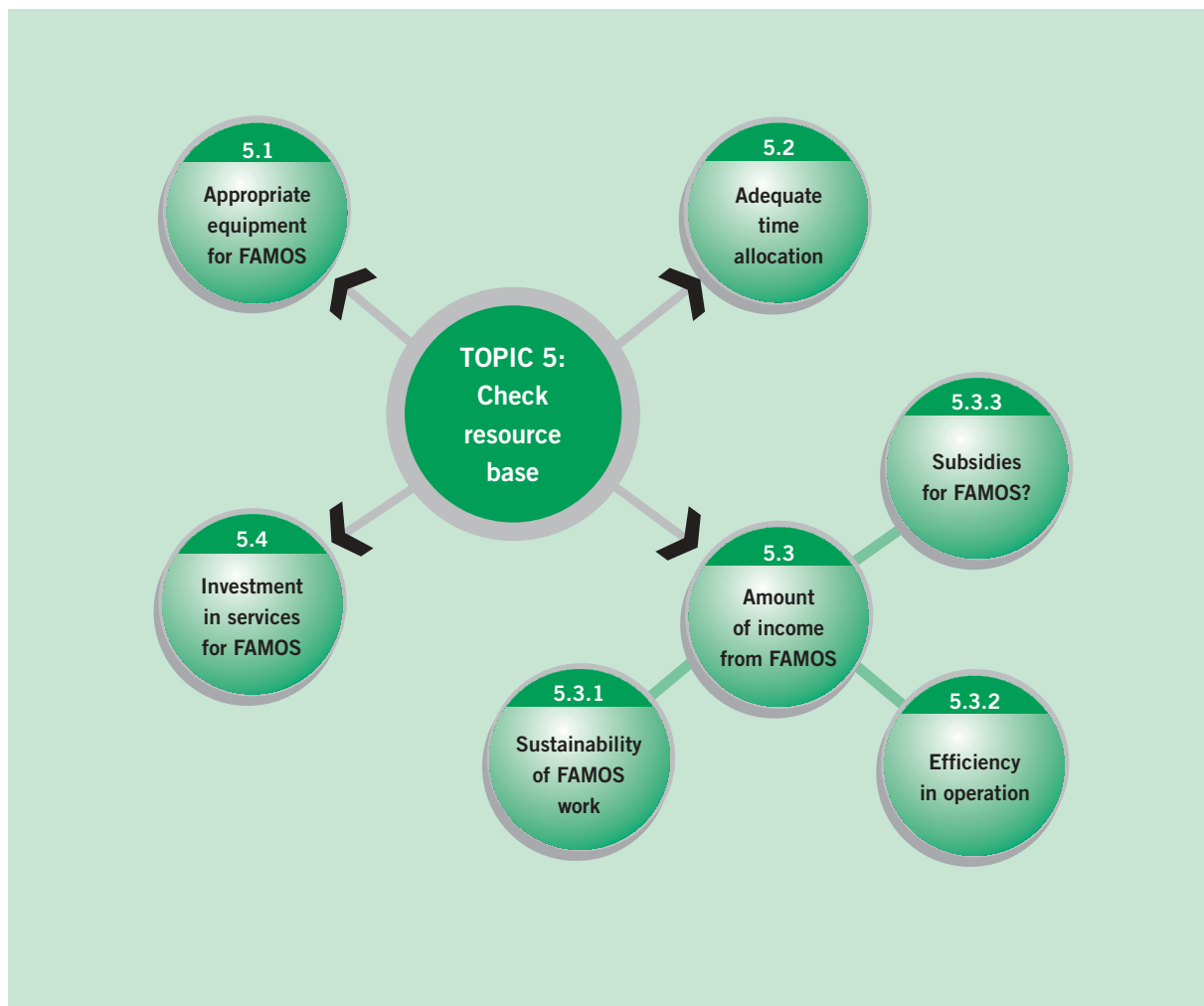
**Workshop methods:**

- Diamond analysis (money, time, knowledge, attitude required to access the organization)

- ➔ Can FAMOS clients afford the time and money required to visit the organization, participate in its activities and access its services?
- ➔ Do FAMOS need to have a certain level of knowledge in order to participate in the organization's activities and access its services? Is this a barrier?
- ➔ Is the prevailing attitude within the organization welcoming and gender-sensitive, rather than dominated by particular cultural, social or gender stereotypes?
- ➔ Are the organization's offices close to residential or business areas? Are they accessible to people with physical disabilities?
- ➔ Are the organization's offices in a safe and secure area where women are unlikely to suffer harassment or threats?



## Topic 5: Resources



## Topic 5


## Check the organization's resource base: Does the organization have sufficient resources for working with FAMOS?

### ■ Questions to be asked:

5.1 Is the equipment used by the organization appropriate for working with FAMOS?


- ➔ Does the organization have proper equipment (computers; training and audiovisual aids; furniture) which is adaptable enough for working with FAMOS clients?
- ➔ Does the organization have an appropriate space or building for its work with FAMOS?

Recommended methods



**Interviews:**


- Key employees
- Managers



**Workshop methods:**


- SWOT analysis of the equipment and premises
- Diamond analysis

Recommended methods




**Document analysis:**

- The organization's handbook and procedures



**Interviews:**

- Key employees
- Managers



**Workshop methods:**

- SWOT analysis (time allocation)
- Diamond analysis

5.2 Is sufficient time allocated for working with FAMOS clients?

- ➔ Are the staff of the organization able to devote sufficient time for their work with FAMOS?
- ➔ Do administrative and other tasks prevent staff from spending sufficient time on their work with FAMOS?
- ➔ Is the time allocated for work with FAMOS proportionate to the contribution that FAMOS make to the organization's income?



5.3 Is the organization's income from FAMOS clients sufficient to cover costs and generate profits?

5.3.1 Is the organization self-sustainable through its sales to/ income from FAMOS?

### Recommended methods



#### Document analysis:

- Short financial analysis



#### Interviews:

- Key employees
- Managers



#### Workshop methods:

- SWOT analysis
- Diamond analysis
- Mind-mapping

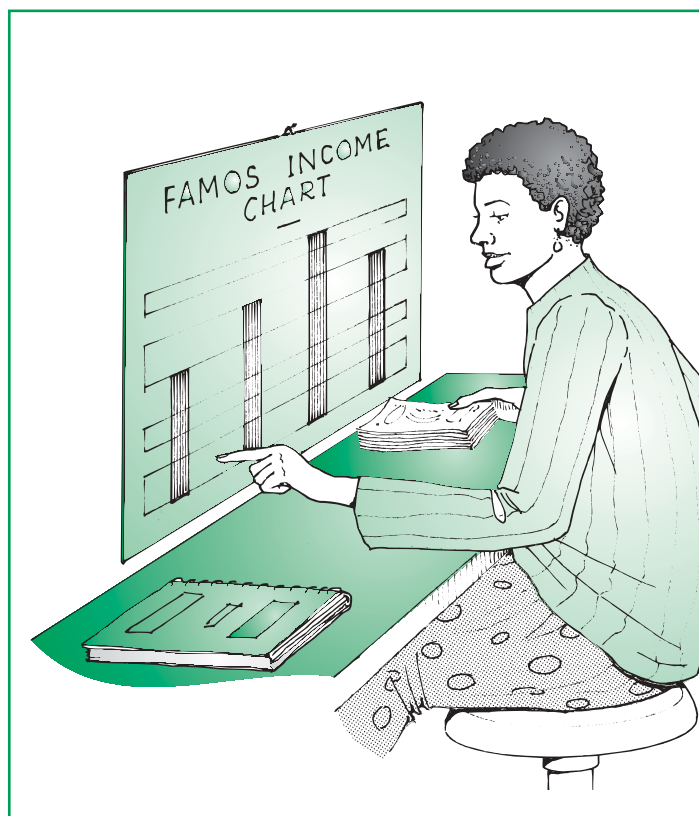
→ What percentage of total income derives from FAMOS clients? Is it more or less than 30%? Is the organization's income from FAMOS low (the organization may be working with too many micro and small-sized companies)?

→ What percentage of income does the organization receive in the form of a subsidy for its work with FAMOS?

→ What percentage of the organization's budget is allocated for work with FAMOS?

→ Does the organization monitor sales /income generated by female and male entrepreneurs respectively, and disaggregated by sex? Does the organization monitor sales/income generated by size of enterprise and by sector?


→ Is the average income generated by each employee higher for staff working with FAMOS or for those working with other groups of clients?



### Tip for facilitators

These questions are aimed at helping to identify the importance (or the lack of it) of FAMOS to the organization's operations.






**Recommended methods**

- Document analysis:**
  - Short financial analysis
- Interviews:**
  - Key employees
  - Managers
- Workshop methods:**
  - SWOT analysis
  - Diamond analysis
  - Mind-mapping

5.3.2 Are the organization's costs arising from its work for FAMOS clients low? Are profits generated from working with FAMOS? Is the organization working efficiently?

- ➔ What is the profit margin?  $\frac{\text{Income} - \text{Costs}}{\text{Income}} \times 100$
- ➔ What are the overheads or indirect costs involved and how do they compare (as a percentage) with total costs?
- ➔ What are the highest cost items (e.g. staff salaries)?
- ➔ Does the organization apportion the costs of serving FAMOS by region (rural/urban), legal status (groups/sole proprietor), size/scale, or sector?



**Recommended methods**

- Document analysis:**
  - Short financial analysis
- Interviews:**
  - Key employees
  - Managers
- Workshop methods:**
  - SWOT analysis
  - Diamond analysis
  - Mind-mapping

5.3.3 Does the organization receive any subsidies or project funds to support its work with FAMOS?

- ➔ What percentage of income does the organization receive as a subsidy for its work with FAMOS in terms of the organization's total income?
- ➔ Does the organization expect to receive a subsidy for its work with FAMOS in the future?
- ➔ In its financial planning, is the organization reliant on subsidies?
- ➔ Is the organization trying to establish sustainable FAMOS activities and services (i.e. activities and services that can continue without subsidies or project funds)?

5.4 Is the organization investing a significant amount in order to be able to provide services to FAMOS?

- ➔ What percentage of the organization's funds is employed in providing services for FAMOS?
- ➔ Are the staff costs of those working on FAMOS proportionate to the contribution made by FAMOS services to the organization's income?
- ➔ Are the costs of training staff for work with FAMOS proportionate to the contribution made by FAMOS services to the organization's income?



### Recommended methods



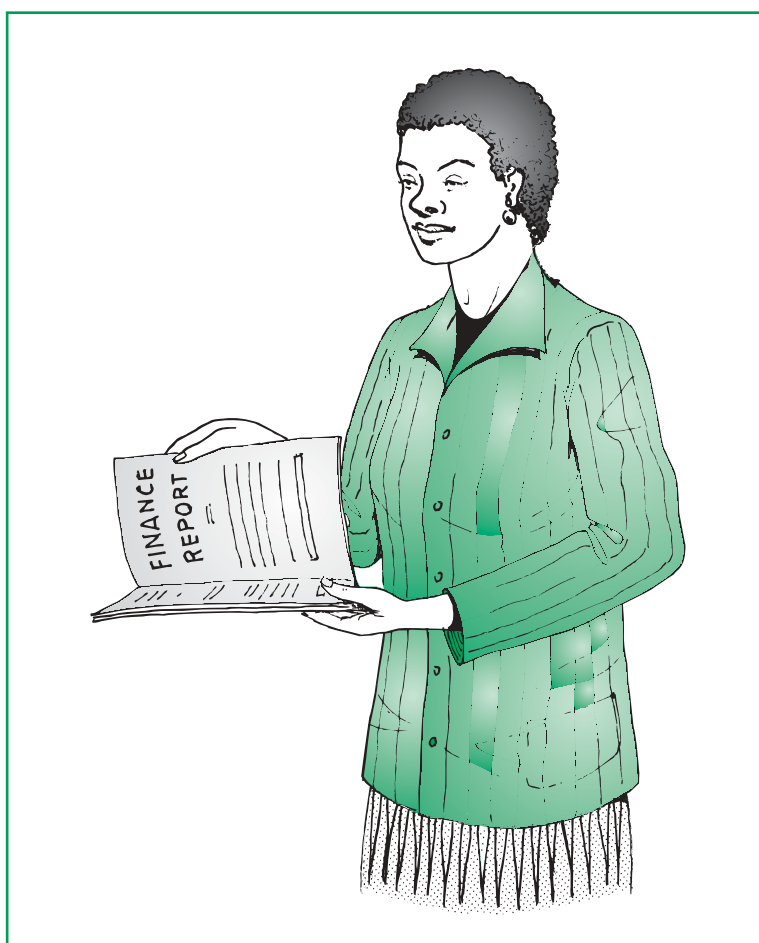
#### Document analysis:

- Summarized financial documents

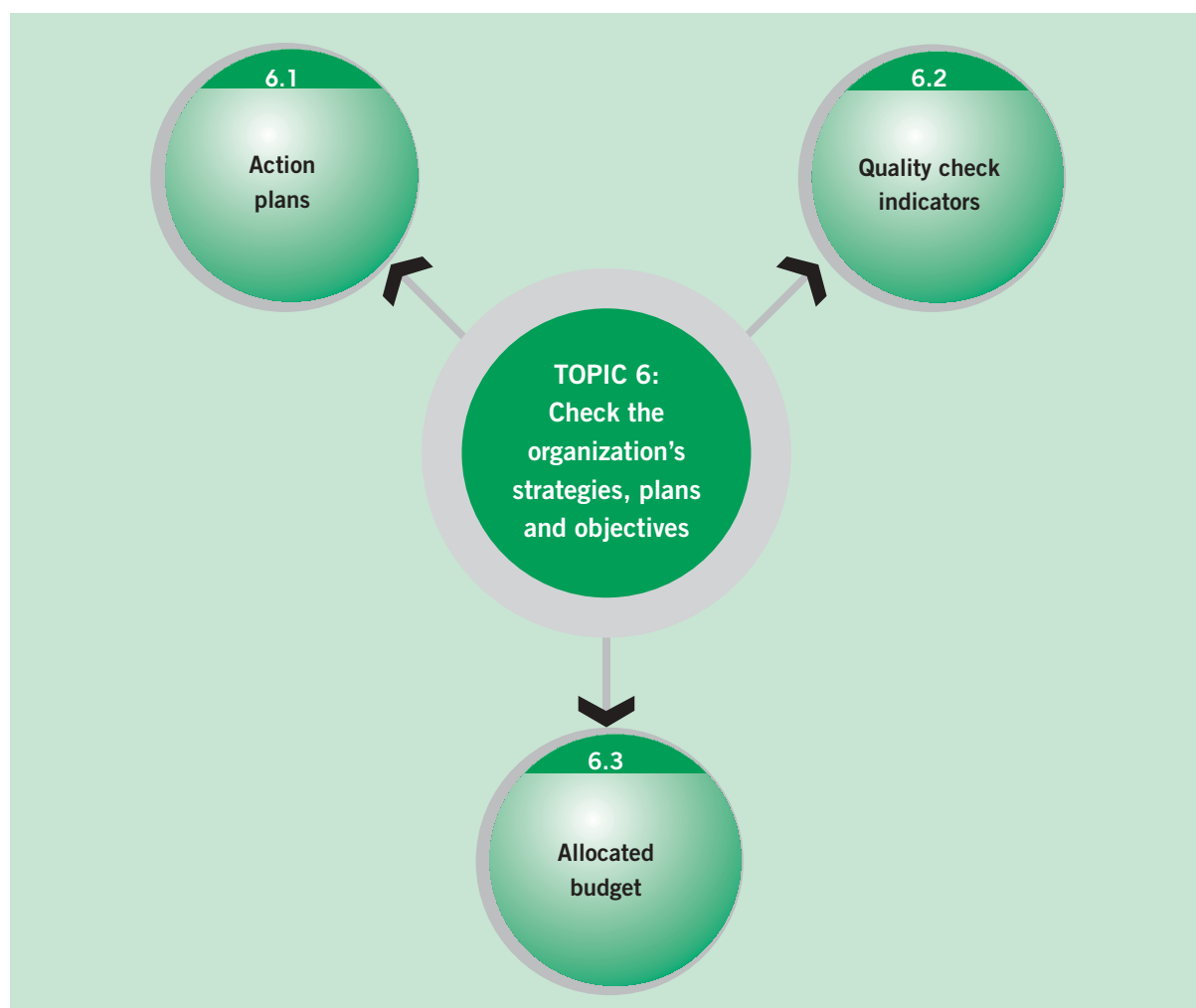


#### Workshop methods:

- SWOT analysis
- Diamond analysis
- Mind-mapping



## Topic 6: Strategies



### Topic 6

### Check the organization's strategies: Do the organization's strategies, plans and objectives highlight its work for FAMOS?

#### ■ Questions to be asked:

#### Recommended methods



##### Document analysis:

- Strategy and policy documents



##### Interviews:

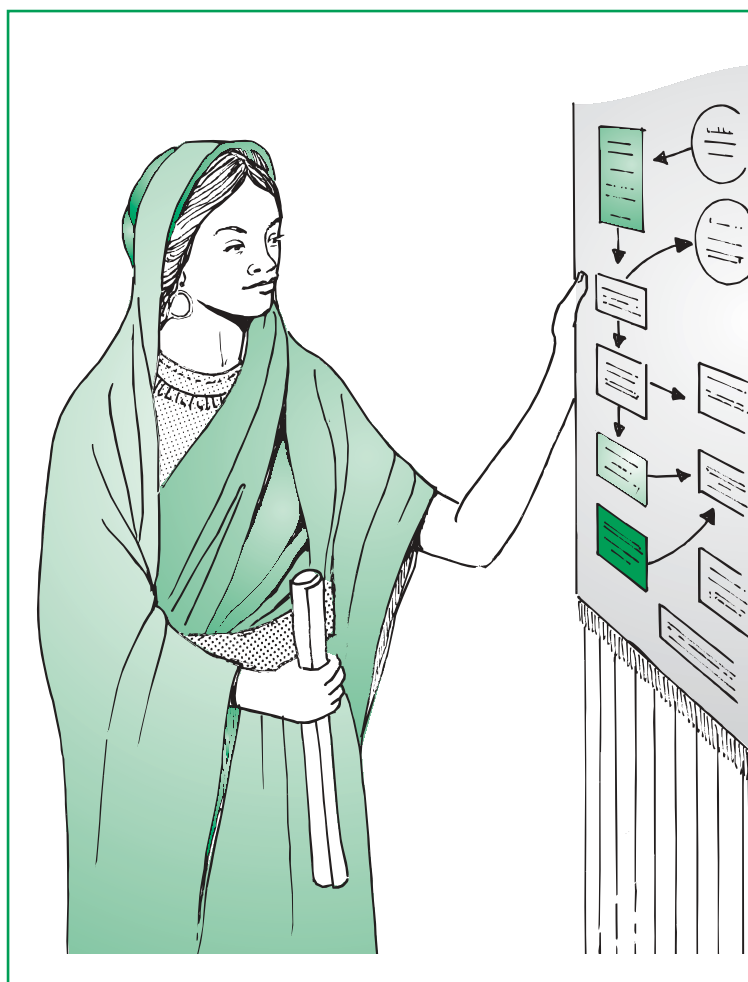
- Key employees
- Managers



##### Workshop methods:

- Mind-mapping
- Logical Action Planning

- 6.1 Does the organization have specific Action Plans (or components of its Action Plans) for its work with FAMOS?
- 6.2 Does the organization have indicators for measuring the quality and extent of its work with FAMOS?
- 6.3 Does the organization allocate a budget for working with FAMOS?



# Part C

## METHODS USED IN PERFORMING THE FAMOS CHECK



## Part C – METHODS USED IN PERFORMING THE FAMOS CHECK

Part B outlined the issues to be considered in conducting the FAMOS Check. This section complements the 'FAMOS Check Guide' (Part B) by describing the various methods and tools mentioned under each of the six topics. An organization can use the methods described here to gauge the extent to which its activities and services meet the needs of Female And Male Operated Small enterprises (FAMOS).

### FAMOS Check Methods



#### Workshop Methods

These comprise a range of tools which can be used by a group of people (facilitators and employees) for analysing information. The FAMOS Check emphasizes this participatory approach, as it is designed to tap into people's potential for improvement.



#### Document Analysis

This involves extracting information from existing internal written materials about the organization's work in relation to Female And Male Operated Small enterprises.



#### Interview Methods

These are concerned with when and how to use the questions set out in Part B in an interview situation.



#### Feedback & Results of the FAMOS Check

These activities highlight strategies for organizational improvement developed through the FAMOS Check process. They are to be implemented by the organization.

## Using the FAMOS Check Methods

The first step is to understand the FAMOS Check process as described in Part A. In Part B, a selection of methods is suggested. These are detailed here in Part C. This section describes how these methods work, and presents tips on what factors to consider when using them. The methods are presented in handouts numbered from 1 to 11, as shown in the table below. Where there is a need to provide some background explanation, this is presented in the handout. The tables included in Handout 9 can be used for the Document Analysis method. Ensure that sufficient copies of the handouts are available.

## Details of the methods

Type of method	Name of method	Handouts
<b>Workshop</b>	Hofstede's Onion/Culture Check	Handout 1
	Historical Time-line Exercise	Handout 2
	FAMOS Knowledge and Awareness Quiz	Handout 3
	Diamond Analysis	Handout 4
	Chapati Diagram Analysis	Handout 5
	SWOT Analysis	Handout 6
	Mind-Mapping Exercise	Handout 7
	Preparing Local Action Plans	Handout 8
<b>Document</b>	Document Analysis	Handout 9
<b>Interviews</b>	Interview Methods	Handout 10
<b>Feedback</b>	Feedback Session Guide	Handout 11



## Handout 1

## Hofstede's Onion/Culture Check



### Find out more about



- existing expertise in relation to FAMOS competence and capacity building;
- knowledge management in the organization;
- staffing and human resources;
- the organization's culture and philosophy;
- informal management and communication processes within the organization;
- perception of the importance of equality of support for women entrepreneurs – and the organization's achievements in this field.

### Questions addressed in Part B



- 2.1.1 Do staff in the organization have awareness of and training in servicing FAMOS clients?
- 2.1.2 Do those employed in the organization have experience in working with FAMOS?
- 2.2.5 Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?
- 4.1 Is communication with FAMOS clients friendly?
- 4.4 Do FAMOS services have sufficient status and importance within the organization? – and is this reflected at the strategic level?
- 4.5 Are the organization's staff motivated to work with FAMOS clients?

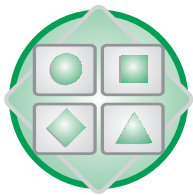
### Suggested time



Two hours



## Method



At least two facilitators are required.

Using the metaphor of an onion, this exercise helps participants to “peel away” layers of the organization/work unit to reach its core – the organization’s culture. Participants can identify aspects of the organizational culture that either promote or hinder good quality support for FAMOS in general, and women entrepreneurs in particular. The participants’ suggestions or findings from this exercise should be written on small pieces of paper and physically “stuck” in the appropriate layer of the “organizational onion”.

This can be done by the facilitator or by the participants. This approach can be particularly effective if supported by technical staff, as they are often in the best position to explain why an organization/work unit functions the way it does.

## Preparation



The facilitators should help by translating terms and/or concepts that are used during this exercise into the local language as necessary.

Practical examples from the local context should also be identified. These can be used in explaining what is meant by “symbols”, “artefacts”, “expressions”, “champions”, “heroes”, “heroines”, and “norms and values” (see Handout 1.1).

## Flip chart

**Exercise on the Culture of an Organization**

**Goal:** To identify the organization/work unit’s culture with respect to FAMOS in general, and women entrepreneurs in particular.

**How:** Peel away layers of an imaginary onion to discover how and why an organization functions the way it does.

## Suggested materials



- Flip chart with a drawing of a large onion (see Handout 1.1)
- Small cards (cards of four colours can be used – one colour for each layer)
- Markers
- Tape

### Tips for facilitating



Ask the participants to sit in a circle so that they can see each other. The facilitators should help to create an atmosphere of trust and confidentiality – issues relating to an organization’s culture can often be sensitive. First of all, emphasize the goal of the exercise: to uncover aspects of the organization’s culture that either promote or hinder good quality support for FAMOS in general, and women entrepreneurs in particular. Also make it clear that the results of the onion exercise will be reported anonymously in the FAMOS Check report.

Divide participants into small groups, if possible grouping together those sharing similar tasks or responsibilities. Ask them to discuss and write down on cards the various symbols and artefacts, champions/heroines/ heroes, rituals, norms and values of their organization/work unit. The facilitators should place these cards on the appropriate layer of the onion (see Handout 1.1).

In a plenary session, participants should then discuss the overall image of the organization that emerges from this exercise.

Is this an organization/work unit that:

- respects a work/family balance?
- respects women as much as men?
- respects different ethnic and language backgrounds?
- respects people with disabilities and people living with HIV and AIDS?
- respects technical and professional staff as much as support staff?

Are there aspects of the organization/work unit’s culture that participants would like to change? How can these changes be brought about?

Other relevant questions that could be used with a view to bringing about change in the organization/work unit’s culture:

- How do the various stakeholders view the organization and its culture?
- Do stakeholders think it is FAMOS-friendly, and that it is genuinely involved in promoting both women’s and men’s entrepreneurial development and empowerment?
- Are objective comments and criticisms received and welcomed from outsiders as well as from those inside the organization?
- What is the organization’s reputation in terms of supporting entrepreneurial and independently-minded women and men?
- Within the organization, who has the greatest influence and responsibility for ensuring that both women’s and men’s entrepreneurial issues are taken seriously?
- Are people within the organization offended or hurt by certain types of jokes or “humour” – e.g. sexist, racist or religious jokes, or jokes about people with disabilities? If yes, who is offended and in what way? And what does the organization do about it?

## Tips for facilitating



In FAMOS-type workshops, people have found the concept of “**rituals**” (see Handout 1.1 for definition) difficult. Therefore, any examples given should be particularly well-prepared in advance and should refer specifically to the organization that is carrying out the FAMOS Check.

The discussion about “**values**” (see Handout 1.1) can also prove to be difficult, as values are sometimes considered very private, and as having little or nothing to do with work. Values are also perceived as “fixed” by society or by the organization, and one feels obliged to follow them. Therefore, examples should be given of some typical values, and how they influence the work of the organization. Depending on how familiar people are with these concepts, time for discussion should be varied accordingly.



**Before moving on, check that all the participants have understood this method and how it should be used.**

### Handout 1.1

### Relevant Definitions and Terms

The relevant definitions and terms are given below, together with some questions that can help in eliciting information relating to these terms:

#### Symbols and artefacts

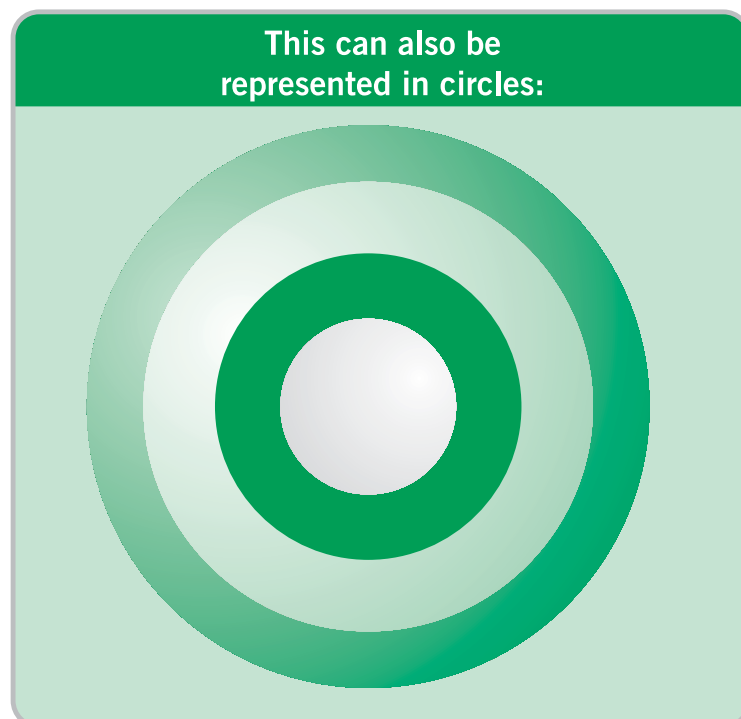
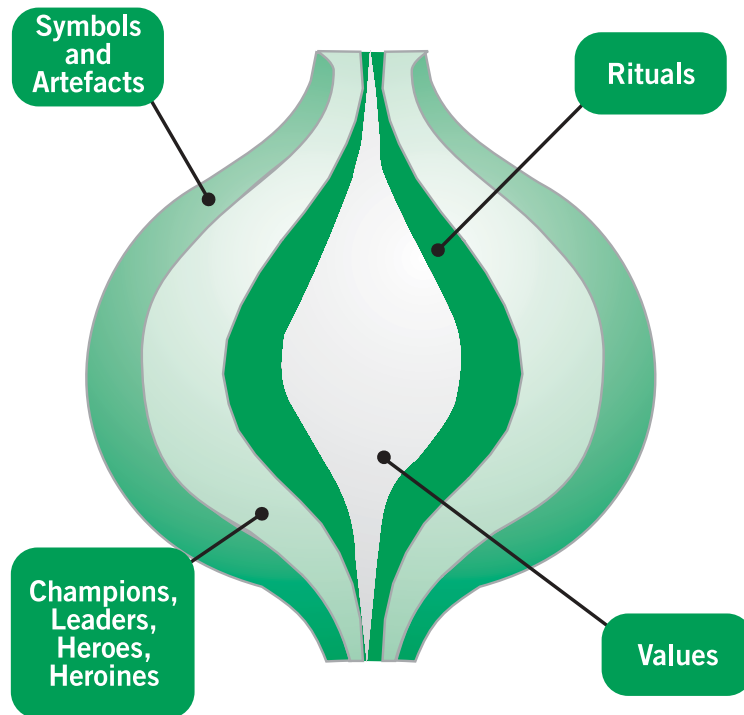
##### **Symbols and artefacts (surface aspects of the organization)**

In this context, the term refers to words, images or objects (e.g. the building, the logo) that have a particular meaning specifically for the members of the organization. The objects and words used can help to provide clarity about the organization's level of experience and friendliness towards FAMOS, and if it involves and engages both women and men.

##### **Symbols and artefacts – the surface layer**

- What visible indicators are there that the organization has experience with FAMOS; welcomes FAMOS as clients; involves both women and men; sees FAMOS issues as important; and motivates its staff to work with FAMOS?
  - What words can be used to describe the organization/work unit?
  - Is a certain image or metaphor associated with the organization/work unit?
  - Are these words and images as important, inclusive and symbolic for women as they are for men?
-

The Four Layers of the Organizational Culture —  
as represented by Hofstede's Onion



### People: Champions, leaders, heroines and heroes

For the purposes of the FAMOS Check, champions, leaders, etc. are women and men, real or imagined, who have characteristics that are held in high esteem in the organization or who somehow personify the organization. In particular, it is important for the organization/work unit to identify and spotlight women and men who are especially experienced in promoting Female And Male Operated Small enterprises (FAMOS) and ensuring friendly and inclusive approaches to FAMOS.

Champions, leaders, heroines and heroes – those who represent positive attitudes to FAMOS among the staff

- Are there women and men who:
  - ➔ are particularly experienced with FAMOS?
  - ➔ have a FAMOS-friendly approach?
  - ➔ have a senior position in the organization/work unit?
- Do these heroines/heroes convey a certain message in relation to FAMOS and women entrepreneurs in particular?
- Which of the organization's values do these people represent?
- Are there also "villains" who convey a poor image of the organization or work unit's involvement with FAMOS issues?

### Rituals

Rituals can be interpreted as the collective activities that are considered to be socially essential but are not strictly necessary in realizing the organization's objectives. Rituals reflect the organization's operational climate: endless or non-existent coffee breaks; Friday evening socializing; annual outings, etc. Rituals include activities that are not defined as "work". Rituals can nevertheless be perceived as impacting on the staff's experience, knowledge and motivation in working with both Female And Male Operated Small enterprises.

**Rituals are activities which are not defined as "work".**

- Which activities are not considered to be "work" by the organization/work unit, but are nevertheless instrumental in increasing knowledge of FAMOS within the organization, increasing motivation to work with FAMOS, and involving both women and men?
- Do members of the organization's staff regularly work on FAMOS activities together?
- Do the activities and rituals exclude some people in the organization?
- Are some people excluded from some of the rituals? Are some rituals disliked by some people?
- Is it just as easy for women as for men to participate in the organization/work unit's rituals?
- Do the rituals promote a safe and respectful working environment, for the benefit of both employees and FAMOS clients?

**Values and norms**

Values and norms are the collective preferences of members of the organization for doing things one way rather than another. When conducting the FAMOS Check, seek those values which promote improved support for and work with both Female And Male Operated Small enterprises.

**Values to be considered**

- What are considered to be the organization's most important values?
- Explain the values of the organization that are demonstrated through its experience of working with FAMOS, its friendliness, its employment of both women and men, and the status of particular sectors/issues (e.g. FAMOS) within the organization's hierarchy (at all levels).
- What organizational value is most important? Is this value important enough to influence employees to continue or stop working with the organization?
- Does the organization treat all its personnel equally: i.e. women and men; people with disabilities; people living with HIV and AIDS; national and international staff?
- Does everyone in the organization have equal opportunities for job-related training and skills enhancement?



**What needs to be changed? reduced? improved? eliminated? added?**

### Handout 2

### Historical Time-line Exercise



#### Find out more about



- the mainstreaming of gender equality into the way the organization implements its strategies and provides its services;
- decision-making about targeting and serving Female And Male Operated Small enterprises;
- existing expertise, competence and capacity-building activities for FAMOS clients;
- knowledge management within the organization;
- the organization's staffing and human resources;
- the organization's culture and philosophy;
- perceptions of achievement in promoting equality of access and support for women entrepreneurs (this exercise is similar to *Hofstede's Onion*).

#### Questions addressed in Part B



- 2.1.1 Do staff in the organization have awareness of and training in servicing FAMOS clients?
- 2.1.2 Do those employed in the organization have experience in working with FAMOS?
- 2.2.5 Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?
- 4.1 Is communication with FAMOS clients friendly?
- 4.4 Do FAMOS services have sufficient status and importance within the organization? – and is this reflected at the strategic level?
- 4.5 Are the organization's staff motivated to work with FAMOS clients?

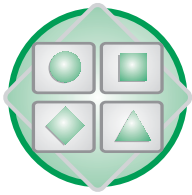
#### Suggested time



One hour



## Method



One facilitator is required.

This exercise involves group reflection on a range of historical factors related to Female And Male Operated Small enterprises (FAMOS) in the organization's programmes and services. These should be placed in chronological order on a time-line.

## Preparation



Some of the likely milestones should be identified and prepared in advance by the facilitator (these can be derived from document analysis or from interviews with key informants).

## Flip chart

**Historical Time-line Exercise**

**Goal:** To create a historical time-line of the organization's development in implementing its FAMOS policy and its approaches to gender equality.

Include milestones such as the introduction of FAMOS-related services or publications.

**How:** As milestones are identified, the participants should add them to the historical time-line on the wall in the workshop area.

## Suggested materials



- A long roll of paper or several sheets of flip chart paper can be attached together and taped on a wall
- Tape
- Markers
- Small cards (alternatively, milestones can be written directly onto the paper)

## Tips for facilitating



This exercise is particularly good for “warming up” participants and helping to “break the ice” at the beginning of a workshop.

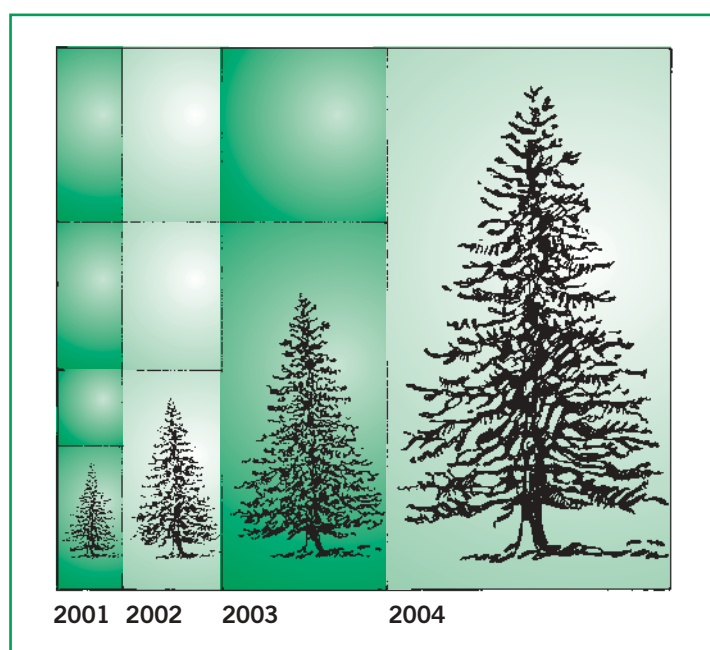
The facilitator can invite participants to be as creative as possible in illustrating past events; work unit “veterans” can help in giving background information.

### Historical time-line

The historical time-line can also be used as a form of “work in progress” during the entire FAMOS Check workshop. If the time-line is posted in the workshop area, all participants can build on it gradually, and eventually use it to illustrate and underpin the findings of the workshop and the final recommendations.

Depending on the level of information available within the group, it might also be possible to make a “mirror time-line” that compares developments at the organization’s headquarters with those of the individual or local work units (e.g. some people at headquarters may specialize in FAMOS, while people in other work units do not).

### Historical Time-line



Before moving on, check that all the participants have understood the method and how it should be used.

## Handout 3

## FAMOS Knowledge and Awareness Quiz



## Find out more about



- staff awareness and knowledge of FAMOS and related gender equality concepts, and of women entrepreneurs;
- the mainstreaming of gender equality – particularly in support of women entrepreneurs – as a cross-cutting concern in the organization's strategic objectives, programmes and budget;
- existing expertise on FAMOS and women entrepreneurs, and the organization's competence and capacity-building activities in this area;
- the management of information and knowledge within the organization.

## Questions addressed in Part B



Start the workshop with the quiz in order to set the stage.

- 2.1.1 Do staff in the organization have awareness of and training in servicing FAMOS clients?
- 2.1.2 Do those employed in the organization have experience in working with FAMOS?
- 2.1.5 Do the organization's staff know how to adapt its activities and services to FAMOS clients?

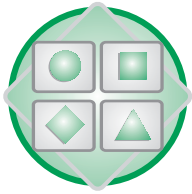
## Suggested time



One or two hours

(Eight questions require approximately one hour; 16 questions approximately two hours. Always select a good balance of questions from Handouts 3.1 and 3.2).

### Method



At least two facilitators should carry out this exercise.

Participants should be asked to sit in a circle. A container (e.g. a basket) of cards with FAMOS and gender-related terms is placed in the middle of the circle. Participants choose a card from the container and read out the word written on it. They explain to the group what they think the term means. Others can then add to the definition, improve on it, or comment on the term's importance.

### OR

Each participant chooses a card and writes her/his definition on the back, before returning the card to the container. Each participant then draws out a card, and reads out the term and the definition provided. Others can then add to the definition, improve on it, and/or comment on the term's importance. As this approach ensures the anonymity of the person who wrote the definition, it may be the more acceptable and less risky approach.

### Preparation



Choose the terms that really need to be discussed and understood by the workshop participants.

Read and discuss the terms (see Handouts 3.1 and 3.2) and clarify any remaining questions participants may have.

### Flip chart



#### FAMOS Knowledge and Awareness Quiz

**Goal:** To assess whether the team has a shared understanding of FAMOS and gender-related terms.

**How:** Explain and discuss FAMOS and gender-related terms (see Handouts 3.1 and 3.2).

### Suggested materials



- Cards with terms written on them
- Container

## Tips for facilitating



This is an excellent way to start a workshop. It permits reflection and analysis of experience-based awareness and knowledge.

The atmosphere should be relaxed and supportive, not like an examination. The purpose is to promote discussion and raise awareness of the importance of the various terms.

Remember to state the goal of the exercise at the beginning of the session: to help to identify participants' level of awareness and knowledge of key terms relating to women entrepreneurs, FAMOS and gender equality.

Select just a few of the more important terms (a discussion of all of them can be overwhelming and time-consuming). Detailed discussion of a few issues has been seen to be very useful by many participants. The ideal number of issues will vary, depending, for example, on how experienced the group is. In general a set of four FAMOS questions and four gender questions should provide a balanced, representative and reasonable number of issues for discussion.

Participants can help one another and add to what others say. When necessary, the facilitator can correct or complement the participants' understanding of a concept.

At the end of the session, ask the participants to list what they have learned, and to write their responses on the flip chart (or ask them to write down what they have learnt), especially as they relate to their daily work.



**Before moving on, check that all the participants have understood the method and how it should be used.**

## Handout 3.1

## Suggestions for Discussion of FAMOS-Related Terms for Greater Awareness and Knowledge

Terms	Definitions, issues and key questions
<b>Definition of FAMOS</b> <ul style="list-style-type: none"> <li>■ What criteria can be used to categorize FAMOS?</li> <li>■ Highlight differences between women and men.</li> </ul>	<ul style="list-style-type: none"> <li>■ <b>Sectors:</b> The type or sector can be important as enterprises owned and operated by female and male entrepreneurs respectively tend to be in different sectors.</li> <li>■ <b>Size:</b> It is important to differentiate between survival, micro, small, and medium-sized enterprises. Women are active mainly in survival or micro-enterprises.</li> <li>■ <b>Profile of target groups:</b> Differentiate between categories such as owners of enterprises, employees of enterprises, start-ups, unemployed, etc.</li> <li>■ <b>Geographical area:</b> Differentiate between clients in rural and urban areas.</li> </ul>
<b>A more detailed description of FAMOS</b> <ul style="list-style-type: none"> <li>■ FAMOS in general, and women entrepreneurs in particular, are heterogeneous (varied) target groups.</li> <li>■ What questions should be asked to gauge the profile of the target group?</li> <li>■ Highlight differences between women and men.</li> </ul>	<ul style="list-style-type: none"> <li>■ What type of entrepreneurial activity is/are the target group(s) involved in?</li> <li>■ How can the entrepreneurial activity be classified in terms of the size of the enterprise and its stage of entrepreneurial development?</li> <li>■ In what year was the entrepreneurial activity started? How many owners does it have?</li> <li>■ What financial resources were used to start the entrepreneurial activity? Were they provided by MFIs, by commercial banks or by family and friends?</li> <li>■ What are the current sources of financing for the entrepreneurial activity?</li> <li>■ How is the entrepreneurial activity performing?</li> <li>■ What are the constraints faced by the target group(s) in their entrepreneurial activity?</li> <li>■ What are the risks faced by the target group(s), including those relating to their entrepreneurial activity?</li> <li>■ What is the educational level of the target group(s)?</li> <li>■ Does/do the target group(s) need intensive coaching and support?</li> <li>■ Are both women and men in the target groups expected to think and act independently?</li> <li>■ What is the target group's potential? Is it ready for change?</li> <li>■ What are the key success factors of the target group(s); what do they see as the key success factors for their entrepreneurial activity?</li> <li>■ What are the needs and demands of the target group(s)? (See key questions about demands)</li> </ul>

Terms	Definitions, issues and key questions
<b>FAMOS needs</b> <ul style="list-style-type: none"> <li>■ What criteria can be used to define the needs of Female And Male Operated Small enterprises?</li> <li>■ Highlight differences between women and men.</li> </ul>	<ul style="list-style-type: none"> <li>■ Are women and men active as entrepreneurs in the formal or informal economy? How many are operating in each economy respectively, and what size of enterprises are they running?</li> <li>■ In what sectors are survival, micro and small enterprises traditionally active? Which of these sectors have growth potential?</li> <li>■ In what sectors are women and men entrepreneurs, respectively, traditionally active? To what extent are they operating in sectors that have growth potential?</li> <li>■ What is the degree of market saturation in both the traditional and non-traditional sectors where FAMOS are operating?</li> <li>■ What are the entry barriers facing entrepreneurs in traditional sectors? Do they differ for women and men?</li> <li>■ What are the entry barriers to women and men in non-traditional growth sectors?</li> <li>■ What are the barriers to growth for Female And Male Operated Small enterprises in traditional and non-traditional sectors?</li> <li>■ What are the barriers to growth specific to women entrepreneurs in traditional and non-traditional sectors?</li> </ul>
<b>Demand for services from FAMOS</b> <ul style="list-style-type: none"> <li>■ The demand for services from FAMOS in general, and women entrepreneurs in particular, is very varied.</li> <li>■ Highlight differences between women and men.</li> </ul>	<ul style="list-style-type: none"> <li>■ How aware are enterprises of the services supplied by the organization carrying out the FAMOS Check? Do they understand the benefits of the services the organization offers?</li> <li>■ What types of enterprise are using which services, e.g. various forms of BDS (Business Development Services)? What types are not? List the services that are being used, and which types of clients are using them.</li> <li>■ Are some services offered in conjunction with other services and products (service package)? Are these packages suitable for both Female And Male Operated Small enterprises?</li> <li>■ What benefits are enterprises looking for from services? What services are enterprises looking for and why? What services are they not using?</li> <li>■ What service features do FAMOS want? Are both women and men entrepreneurs satisfied with the services currently available?</li> <li>■ How are services delivered? How do FAMOS want services to be delivered? Is there a difference between the needs of women and men entrepreneurs in this respect?</li> <li>■ What prices are FAMOS paying for services? What prices are they willing to pay?</li> <li>■ Why do women entrepreneurs (or female-dominated market segments) use the services? Why not?</li> </ul>

Terms	Definitions, issues and key questions
	<ul style="list-style-type: none"> <li>■ What are the unmet demands of FAMOS clients?</li> <li>■ Does the organization intend to service or upgrade women engaged in the low-growth sectors in which they have traditionally been active?</li> <li>■ Does the organization focus on innovative, as well as traditional, sectors for women entrepreneurs?</li> </ul>
<p><b>Market Research, Marketing and Production</b></p> <ul style="list-style-type: none"> <li>■ To what extent are market-research and marketing considerations addressed?</li> <li>■ Highlight differences between women and men.</li> </ul>	<ul style="list-style-type: none"> <li>■ <b>Market Research</b> is essential for an entrepreneur who wishes to create and expand a business in a sustainable manner. It helps the entrepreneur to determine not only what product or service she/he may wish to provide, but also how to provide it and for whom it should be targeted. It can also help to determine the design of the product/service. <b>Marketing</b> is an ongoing set of activities whereby the entrepreneur attempts to ensure that potential customers are guided through a process leading from awareness to action, eventually leading to demand for the product/service. The AIDA marketing model includes:             <ul style="list-style-type: none"> <li>➔ Awareness (of the product) to Interest;</li> <li>➔ Interest (curiosity about the product) to Desire;</li> <li>➔ Desire (to buy the product/service) to Action;</li> <li>➔ Action (i.e. actually buying the product or service being offered).</li> </ul> </li> </ul> <p>Market research and marketing are important stages in a process that requires a holistic approach towards customers and their needs.</p> <p>Both Female And Male Operated Small enterprises may need assistance in identifying how they should proceed with the various stages of the market research and marketing processes, and identifying what tools are appropriate.</p> <ul style="list-style-type: none"> <li>■ All stages of the product life cycle are important from a marketing perspective. The results of market research (e.g. the views/needs of targeted, potential clients) will influence decisions at each stage of the product life cycle, e.g. when starting production (after carrying out market research and deciding on the design), the quality of the raw materials may be an important factor, influencing the quality of the product. The manufacturer must consider what level of quality will best meet the target clients' demands. The entrepreneur also needs to consider what price the customer will be prepared to pay for the finished product/service.</li> </ul>



Terms	Definitions, issues and key questions
<b>Business Development Services (BDS)</b> <ul style="list-style-type: none"> <li>■ What is the donor's approach in supporting BDS, and why?</li> <li>■ Highlight differences between women and men.</li> </ul>	<p>Most donor agencies have agreed to try to facilitate the development and provision of non-financial services, and to promote their greater use by both Female And Male Operated Small enterprises. They are unlikely to finance the provision of BDS directly. This approach was chosen in order to:</p> <ul style="list-style-type: none"> <li>■ achieve wider outreach;</li> <li>■ achieve financial and organizational sustainability;</li> <li>■ balance development and business goals ;</li> <li>■ avoid market distortion.</li> </ul> <p>Women entrepreneurs are still a largely unserved market when it comes to BDS provision.</p>
<b>Marketing for FAMOS</b> <ul style="list-style-type: none"> <li>■ A service company needs to ask questions concerning the Product, the Price, the Place and the Promotion of its FAMOS services.</li> <li>■ Highlight differences between women and men.</li> </ul>	<p>The four "Ps" of the Marketing Mix:</p> <p><b>Product:</b></p> <ul style="list-style-type: none"> <li>■ What types of business development products/services are being demanded by different female and male segments of the target groups?</li> <li>■ What products/services are needed to promote economic development in the Female And Male Operated Small enterprise target group segments?</li> <li>■ Of the organization's existing products/services, which can be adapted to create other products, or to cover other fields of activity of particular interest to women and men?</li> </ul> <p><b>Price:</b></p> <ul style="list-style-type: none"> <li>■ What price are FAMOS target group segments willing and able to pay for the organization's services?</li> <li>■ What pricing would make the product/service profitable, or at least cover the service provider's costs?</li> </ul> <p><b>Place:</b></p> <ul style="list-style-type: none"> <li>■ What service providers, suppliers or distributors can enable the organization to offer the appropriate product or service to the various female and male target group segments?</li> <li>■ What would be the appropriate place for the organization to offer services to the various FAMOS target group segments?</li> </ul> <p><b>Promotion:</b></p> <ul style="list-style-type: none"> <li>■ What promotional methods would be effective in increasing FAMOS clients' awareness of the services offered?</li> <li>■ What promotional methods would lead to an increase in suppliers' awareness of demand from FAMOS clients?</li> </ul>

Terms	Definitions, issues and key questions
<b>Microfinance</b> <ul style="list-style-type: none"> <li>■ What are the key elements of success for microfinance programmes and institutions?</li> <li>■ Highlight differences between women and men.</li> </ul>	<ul style="list-style-type: none"> <li>■ Is there an understanding of the needs of both Female And Male Operated Small enterprises, and is microfinance provision adapted to the local context?</li> <li>■ Are potential Female And Male Operated Small enterprise clients provided with credit training that is appropriate to their needs and adapted to the local context?</li> <li>■ What are the barriers facing disadvantaged groups of FAMOS? Can they be eliminated or minimized, for example by employing staff from the disadvantaged groups?</li> <li>■ Are the financial services provided simple, appropriately priced and adapted to the local context? What is the level of demand for financial services from both Female And Male Operated Small enterprises?</li> <li>■ Is delinquency (i.e. bad debt) control effective, efficient and stringent enough?</li> <li>■ What emphasis is given to savings mobilization services? Are the methods appropriate for both Female And Male Operated Small enterprises?</li> <li>■ To what extent is there a focus on the operational efficiency of the microfinance programme and the institution?</li> <li>■ Do the clients and MFIs (Micro-Finance Institutions) exercise financial discipline?</li> <li>■ Are the donors of the microfinance programmes of MFIs pursuing coherent policies in serving FAMOS?</li> <li>■ Can FAMOS initiatives attract commercial finance by involving depositors, lenders and investors?</li> <li>■ To what extent is there cooperation at the local, national and international levels with regard to microfinance policy for FAMOS?</li> </ul>
<b>Enabling environment</b> <ul style="list-style-type: none"> <li>■ What components of the business-enabling environment must be in place to support FAMOS clients?</li> <li>■ Highlight differences between women and men.</li> </ul>	<ul style="list-style-type: none"> <li>■ Is there macro-economic and social stability?</li> <li>■ How do state and local administrations function (transparently, equitably, efficiently)?</li> <li>■ How enabling is the legal framework (e.g. laws and regulations concerning licences and taxes, financial sector policy), and are the laws being effectively enforced?</li> <li>■ Are import and export regulations effective (e.g. do they give some form of protection to the local and national economy, but at the same time allow for affordable imports of necessary inputs)?</li> <li>■ How is the internal security situation (e.g. low crime rate, no police harassment)?</li> </ul>

Terms	Definitions, issues and key questions
	<ul style="list-style-type: none"> <li>■ Do the inputs (purchases) and outputs (sales) markets function smoothly? For example:               <ul style="list-style-type: none"> <li>➔ financial sector inputs (microfinance; SME finance; range of financial products on offer; outreach to different target groups or agreements)</li> <li>➔ non-financial services (access to information; mentoring support; marketing services)</li> </ul> </li> <li>■ Is the economy buoyant enough to make entrepreneurial activity worthwhile and profitable for both Female And Male Operated Small enterprises?</li> <li>■ How high is population density and what are the demographic trends?</li> <li>■ Is the socio-economic environment supportive and conducive to poor people engaging in enterprise activity?</li> <li>■ Is there coherence among various policy initiatives in order to ensure consistency in supporting Female and Male Operated Small enterprises?</li> </ul>
<p><b>Entrepreneurship</b></p> <ul style="list-style-type: none"> <li>■ What are key characteristics of an “entrepreneur” (women and men alike)?</li> <li>■ Highlight differences between women and men.</li> </ul>	<ul style="list-style-type: none"> <li>■ Problem-solving abilities</li> <li>■ Creativity</li> <li>■ Persuasiveness</li> <li>■ Ability to act independently</li> <li>■ Flexibility in responding to challenges</li> <li>■ Ability to plan</li> <li>■ Negotiation skills</li> <li>■ Decision-making skills</li> <li>■ Ability to cope with and manage uncertainty</li> <li>■ Proactivity in seeking opportunities</li> <li>■ Goal orientation</li> <li>■ Integrity and reliability</li> <li>■ Capabilities (technical and managerial)</li> </ul>

Terms	Definitions, issues and key questions
<p><b>Sector specific: (to illustrate this point, we have selected agro-processing)</b></p> <ul style="list-style-type: none"> <li>■ What are the typical problems and success factors linked to the marketing of agro-processed goods?</li> <li>■ In relation to these problems, what additional issues and differences exist between female and male farmers or processors?</li> <li>■ Highlight differences between women and men.</li> </ul>	<p>Typical marketing problems facing the (e.g. agricultural) sector:</p> <ul style="list-style-type: none"> <li>■ For traditional farmers, is there lack of information about the market and distribution channels, quality and price of inputs, as well as prices of their outputs?</li> <li>■ For farmers who are in transition from traditional to market-oriented operations, the problems may have to do with storage, processing, grading and access to markets.</li> <li>■ For market-oriented farmers, there may be problems relating to food processing, access to capital and credit, availability of a commodity exchange, marketing services, and packaging.</li> </ul> <p>Success factors for the marketing of processed goods:</p> <ul style="list-style-type: none"> <li>■ What factors could effectively facilitate the success of both Female And Male Operated Small enterprises in the agro-processing sector? <ul style="list-style-type: none"> <li>➔ Availability of information on (local and/or international) prices; seasonal and geographical trends; products; weather; competitiveness (e.g. profit margins, production and marketing costs)</li> <li>➔ Quality control</li> <li>➔ Access to capital/credit/finance</li> <li>➔ Institutional support in terms of microfinance; advice; business management; training</li> <li>➔ Product type and quality; adherence to traditional/international standards; solutions to packaging issues (especially for small quantities)</li> <li>➔ Enabling environment concerning (food) regulations and licensing laws (for example, governments should facilitate links between the food hygiene standards of industrialized countries and their own support and advisory services)</li> <li>➔ Infrastructure: roads; means of communication; availability of warehouse storage facilities.</li> </ul> </li> </ul>

## Handout 3.2

## Gender-related Terms for Enhancing Awareness and Knowledge

Basic gender terms	Definition and key issues
<b>Sex and Gender</b>	<p><b>Sex</b> is a biological attribute and therefore has a fixed definition.</p> <p><b>Gender</b> refers to changeable attitudes, social structures and the socialization of women and men. It recognizes differences among women, among men and between women and men.</p>
<b>Discrimination on the basis of sex</b>	<p>Differential treatment of women and men – e.g. in employment, education, and access to resources and benefits, etc. – on the basis of their sex (for example, women entrepreneurs' greater difficulty in accessing credit). Sex discrimination can also occur when "gender-neutral" policies or practices have a disproportionate, or adverse, impact on a disadvantaged group.</p> <p>Different forms of discrimination tend to be mutually reinforcing, and gender discrimination is therefore sometimes also influenced by discrimination on the basis of disability, race, ethnic group, class, age, caste, etc.</p>
<b>Gender-neutral Gender-blind</b>	<p>A policy or programme is gender-neutral or gender-blind if it applies – intentionally or not – to the general populace without distinguishing between the sexes. Although it has been argued that gender-neutral policies and programmes have the same effect on women and men, gender analysis has shown that they can further disadvantage the less advantaged – often women – and reinforce the power enjoyed by the already advantaged – often men.</p>
<b>Gender equality</b>	<p>Gender equality means that the rights, responsibilities, duties and status of women and men do not depend on whether they are born female or male. This does not mean that women and men are the same or must become the same. Gender equality implies that both women and men are free to develop their personal abilities and make choices without the limitations set by stereotypes, rigid gender roles and/or prejudices.</p>
<b>Gender equity</b>	<p>Gender equity is a term implying a more qualitative approach to the issue, recognizing and taking into account the different needs of women and men, and the extent to which they are met, in order to help achieve greater equality between them.</p>
<b>Strategic gender interests</b>	<p>Strategic gender interests refer to desired changes in existing relationships, roles, tasks and responsibilities at the institutional level, and at the level of women's empowerment. The objective is to increase the decision-making and negotiating power that women have in their personal lives and in society in general. The focus is on the position that women and men hold in society (i.e. long-term).</p>

Basic gender terms	Definition and key issues
<b>Practical gender needs</b>	Practical gender needs relate to daily needs and responsibilities. The objective is not to change existing gender-based divisions of roles and responsibilities, but to fulfil basic needs in the context of the traditional division of roles and responsibilities. This can include access to child and elderly care for those trying to combine running a business with family responsibilities. The focus is on improving the condition of women and men in society (i.e. short-term).
<b>Relationship between private/professional life</b>	Working from a perspective of gender equality has consequences for the balance between a person's private and work life. Family and household roles and responsibilities affect both women and men.
<b>Access to/control over resources</b>	Access to, and the right to use, resources (e.g. land, credit, equipment) to carry out one's business activities.
<b>Sexual harassment and sexual violence</b>	Sexual harassment is conduct of a sexual nature affecting the dignity of women and men which is unwelcome, unreasonable and offensive to the recipient, particularly when rejection or acceptance of such conduct is used as the basis for decisions affecting the recipient's ability to carry out their entrepreneurial activities. Sexual violence occurs when this behaviour is accompanied by physical or psychological violence or threats at work, in the home or in other settings.
<b>Decent work for women and men</b>	Productive work performed in conditions of freedom, equity, security and human dignity, to which women and men have access on equal terms.
<b>Gender mainstreaming</b>	The inclusion of gender equality issues in analysis, planning, performance, personnel policy, monitoring and assessment, thereby changing the content and direction of these practices at the organizational (project and programmes) and institutional levels.
<b>Gender division of labour</b>	This term refers to the distribution of roles and functions between women and men in productive, reproductive and community-based activities. Who does what? When? How? For how long? etc.
<b>Men and masculinities</b>	The emphasis here is on the values and norms that society associates with male attitudes and behaviour, and their effect on both women and men.
<b>Gender and organizational change</b>	This approach recognizes that organizations are some of the main constructors of gender relations. If gender relations in society are to change, organizations must change in terms of what they are, what they do, and what they say. This is fundamental to the FAMOS Check.

Basic gender terms	Definition and key issues
<b>Women's empowerment</b>	The process by which women become aware of the culture in which they live, and identify and carry out actions to overcome any disadvantages that may arise from that culture. These actions can range from strengthening women's self-respect and self-image to promoting greater parliamentary representation of women, or assisting women in starting or improving their own businesses.
<b>Sex-disaggregated data</b>	Differentiation by sex of the quantitative and qualitative data used as a basis for research, analysis, strategy, planning, implementation, monitoring and assessment/evaluation of programmes and projects. The use of sex-disaggregated data reveals and clarifies gender-related differences in areas such as access to and control over resources, access to financial support, division of labour, mobility, and decision-making.
<b>Gender analysis and planning</b>	This term refers to research that aims to reveal inequalities between women and men and how these express themselves in personal and social relations. Such analysis can impact on planning for change when it comes to promoting greater equality in development programmes.
<b>Occupational segregation</b>	In most non-agricultural labour markets in the world, many people work in occupations in which up to 80% of the workforce is either female or male. On the basis of these differences, occupations tend to be typified as "female" (e.g. the service sector) or "male" (e.g. the manufacturing sector).
<b>Religion and tradition (culture)</b>	Both religion and culture are systems of thought and ideology that influence gender relations. They define what a "good" woman or man is, and what is expected of her or him.



## Handout 4

## Diamond Analysis



### Find out more about



- adapting the organization's services to the needs of FAMOS clients;
- methods of delivering services to FAMOS;
- communication with FAMOS;
- the proportion of FAMOS among the organization's clients.

### Questions addressed in Part B



- 1 Does the organization actually have FAMOS as clients/beneficiaries?
- 2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?
- 2.1.5 Do the organization's staff know how to adapt its activities and services to FAMOS clients?
- 4.1 Is communication with FAMOS clients friendly?
- 4.2 Is simple language used in the organization's documents and training materials? — and is it inclusive of both women and men?
- 5 Does the organization have sufficient resources for working with FAMOS?

### Suggested time



One hour



## Method



One facilitator is required.

A cross is drawn on a flip chart. Each arm of the cross represents one aspect of an overall issue (e.g. the organization's friendliness).

**Suggested steps:**

**Step one:**

Define the issue to be explored. Next, get the group to define four criteria and write one on each of the four arms of the cross.

**Step two:**

Put marks on the arms of the cross to indicate how the majority of the group feels that the organization or branch/unit/department is performing in respect of the four criteria at present. The better the organization is performing, the farther the marks will be from the centre.

**Step three:**

Draw a diamond by connecting the four marks and, in discussion with the group, interpret its overall meaning.

**Step four:**

For subsequent diamonds, use different types of lines (e.g. thick, thin, dotted and broken lines), but on the same flip chart.

More diamonds can be drawn to compare the participants' organization with other organizations or with branches of the same organization.

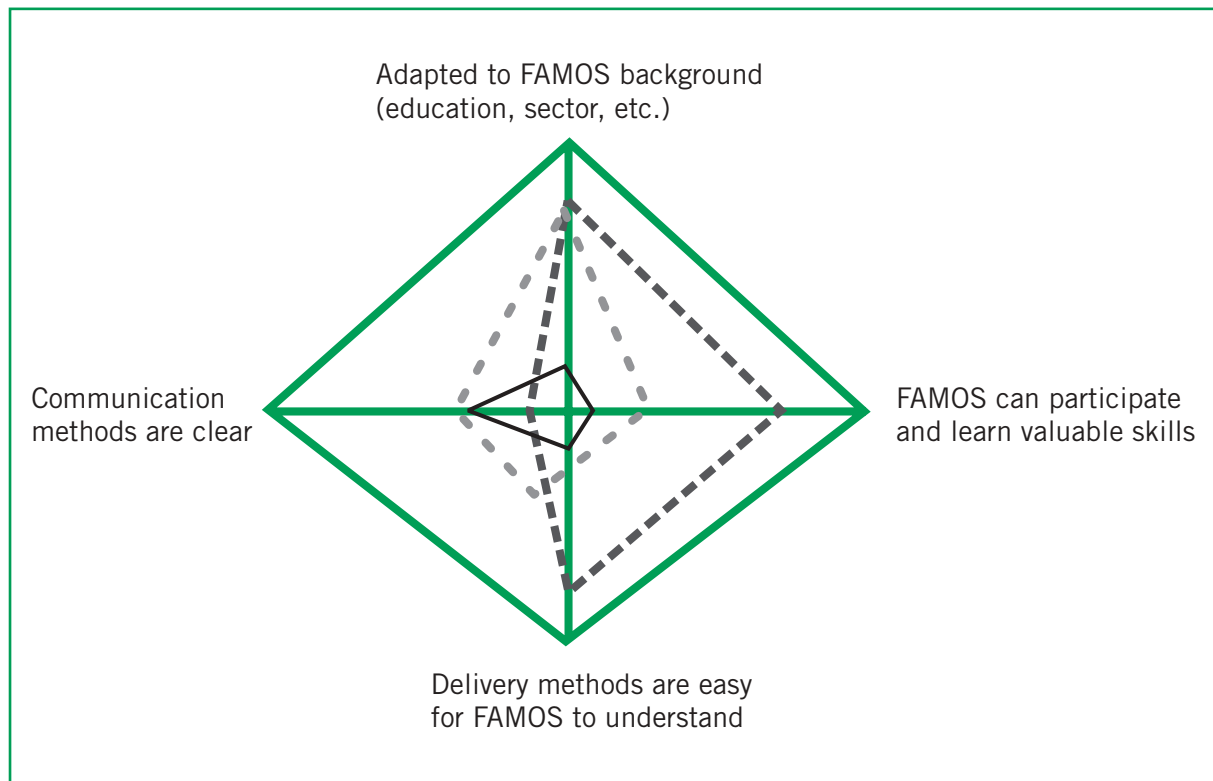
**In the plenary session**, participants should discuss ways of improving the shape of the diamonds by improving the organization's performance with regard to each of the criteria chosen. Relevant criteria that may not have been included in the diamond analysis may also be taken into account.

**Example** of a diamond diagram:

■ "Are the organization's methods of service delivery suitable for FAMOS?"

The diamonds created with different types of lines (e.g. thick, thin, dotted and broken) can represent different perceptions of the organization, or of different units/departments within the same organization. The outermost diamond is the ideal organization/unit – fulfilling all the criteria relating to the issue being examined.

### Method



### Preparation



The facilitator draws a cross in the middle of a flip chart; at the top of the chart the facilitator writes the major issue to be explored e.g. “Is the organization’s service delivery method suitable for FAMOS?”. The facilitator should also prepare suggestions for criteria that might be entered on each arm of the “X”.

### Flip chart



#### Diamond Diagram Exercise

**Goal:** to analyse the organization by examining issues in terms of four major criteria, and to compare it with other organizations, or with other perceptions of the organization, or with other units within the organization.

**How:** Participants create a diagram illustrating the current situation within the organization.

### Suggested materials



- Flip charts
- Markers of different colours

## Tips for facilitating



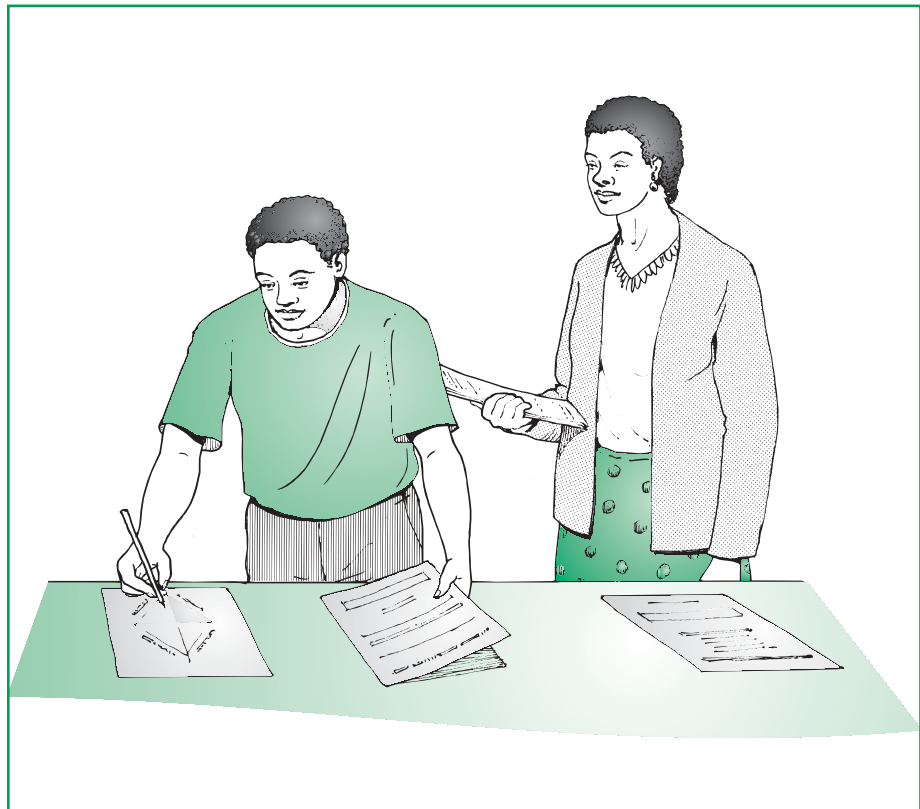
A Diamond Analysis measures the degree to which certain criteria are met by the organization. It facilitates comparisons between different units of the same organization, or between one organization and other organizations. The lines making up the diamond show the current situation, with the result that areas in need of improvement can be quickly identified.

The criteria entered on the arms of the diamond should be formulated positively. This will help in getting an accurate picture of the organization (a mark outside the arms of an existing diamond is always positive; a mark closer to the centre is always negative). This exercise can usefully be done by small groups of participants who are working on the same project. Once they have prepared their group diamonds, they can discuss them together in plenary session.

A Diamond Analysis should be performed before a SWOT analysis, as it is simpler than the SWOT and gives a quick picture or impression of the situation. If this is not sufficient, the group can analyse the issue in more depth using the SWOT analysis.



**Before moving on, check that all the participants have understood the method and how it should be used.**



### Handout 5

### Chapati Diagram Analysis



#### Find out more about



- the organization's existing expertise in the fields of gender and women's entrepreneurship, as well as its existing level of competence in capacity building;
- the organization's choice of partners.

#### Questions addressed in Part B



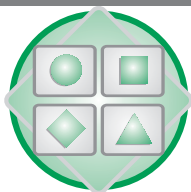
- 1.2 What proportion of FAMOS clients/beneficiaries are women and men respectively? What sector(s) do they operate in? What is the size of their enterprise (MSME)?
- 1.3 How familiar are FAMOS with the organization? Is the organization well known to FAMOS within its area of operation (locally and nationally)?
- 2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?

#### Suggested time



One hour

#### Method

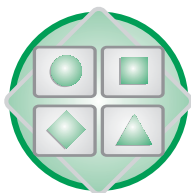


At least one facilitator is required.

This method provides an indication of the relationship that exists between the organization and FAMOS, but it is not a detailed measure of this relationship (benchmarks are not used). After this exercise, a more detailed analysis might still be required.

The facilitator cuts out circles of different sizes that indicate the importance (relevance/influence/strength) of various actors with regard to a specific issue; the circles' proximity to, or distance from, the central circle (issue) indicates how close the actors are to this issue (e.g. FAMOS).

## Method

**Suggested steps:****Step one:**

Work in a small group. Define the FAMOS target market, and identify and make a list of all competitors and other important actors in this market. Circles should then be cut out as described above.

**Step two:**

Draw a circle in the middle of a flip chart to represent the central issue (G). Then add a circle representing the organization (A1) and perhaps another (A2) representing a particularly relevant unit of the organization. Next, add more circles (B, C, D, E, F) for the other actors/competitors identified by the participants in Step one (use the cut-out circles). The size of each circle should symbolize the perceived importance of the organization concerned, while its distance from the central circle denotes frequency of contact.

**Step three:**

Participants should discuss their individual units, and their entire organization, in terms of their closeness to FAMOS (number of services known to and used by FAMOS), drawing red circles around those they consider to be actively working for FAMOS. Participants should also draw a red line between the circle representing their organization and the circles of any other important actors, if they consider that the relationship is driven or influenced by working for FAMOS. Draw lines with arrows indicating the direction of the interaction to show if the relationship is one-way or two-way.

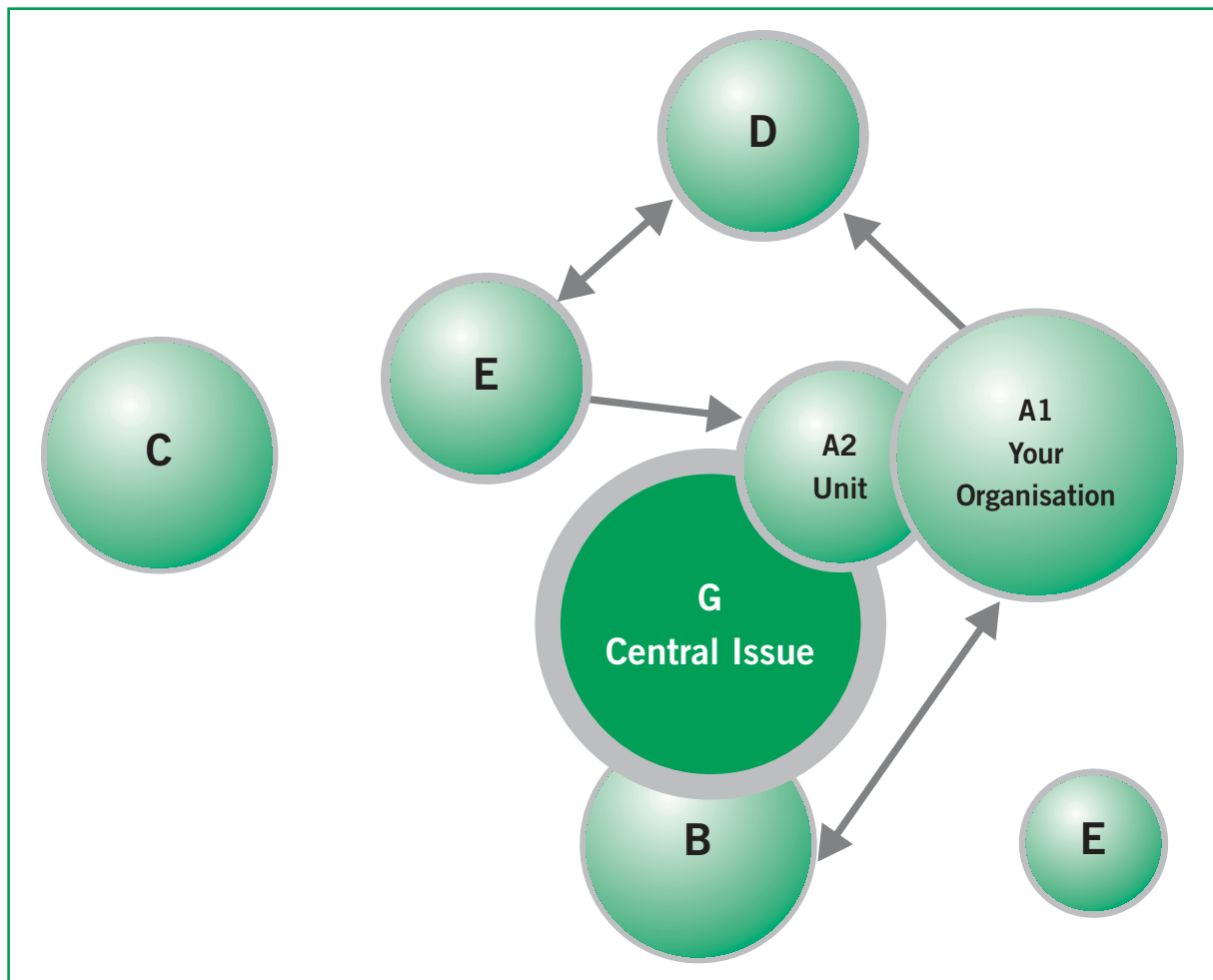
**In the plenary session**, participants should discuss the possibilities and potentialities of this institutional network, such as providing better services for more FAMOS; improving women's empowerment through intensive cooperation; developing proposals for improving the identification and selection of partners; and the content of cooperation with them.

## Preparation



The facilitator draws a circle in the middle of a flip chart; within this circle the facilitator writes “Central Issue relating to FAMOS”

*Example:* **Chapati Diagram**



(A-F are the organizations and G is the central issue)

Circle G represents the central issue.

- How important is the organization’s role in relation to this issue (i.e. how big is the organization’s circle – “A1”)?
- How relevant is the organization’s role to the issue (i.e. how close is the organization’s circle to circle G)?
- To what extent is the organization actively collaborating with other relevant organizations (i.e. how many arrows are pointing out from its circle)?
- To what extent are other organizations/companies (B, C, D, E and F) actively collaborating with it (i.e. how many arrows are pointing in towards the organization’s circle)?

## Preparation



In this diagram, the organization that the participant belongs to is symbolized by the letter A1. The big circle A represents the entire organization, which should ideally be close to the central issue, while the smaller circle (A2) represents a unit of the organization that is especially close.

The large circle B represents another organization/company that is very important to FAMOS.

Circle C represents an organization or company that is also important to FAMOS but not so close; this organization/company may need to make a number of changes and improvements.

The smaller circles D, E and F represent other organizations that are relevant to FAMOS, but not particularly important.

## Flip chart

**Chapati Diagram**

**Goal:** To get an overall view of the organizations working with FAMOS, including the participants' organization.

**How:** Participants work together to create a diagram illustrating the major actors involved in supporting FAMOS.

## Suggested materials



- Circles (to be cut out in different colours and sizes)
- Tape and cards (for (re)positioning circles)
- Markers of different colours

## Tips for facilitating



This exercise is often done by separate small groups of participants who are working on the same projects. They then come together for discussion in a plenary session.



**Before moving on, check that all the participants have understood the method and how it should be used.**

## Handout 6

## SWOT Analysis



### Find out more about



- the organization's mainstreaming of FAMOS clients as a concern that cuts across its strategic objectives, activities/services and budget;
- the organization's existing expertise in working with FAMOS, and its competence and capacity building activities;
- information and knowledge management within and outside the organization;
- the needs of FAMOS clients and, in particular, the specific needs of women entrepreneurs as reflected in the organization's products and services, and its public image;
- the extent to which the quality of services supplied to FAMOS clients is consistent with the organization's public image.

### Questions addressed in Part B



- 2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?
- 2.1.4 Is the organization's expertise in working with FAMOS reflected in its internal training materials?
- 2.2.1 Are the organization's methods of delivering support services appropriate for FAMOS clients?
- 2.2.2 Is the organization's expertise reflected in the promotional materials and brochures it hands out to FAMOS?
- 2.2.3 Does the organization have trained staff and technical expertise for the activities and services it provides to FAMOS clients?
- 3 (3.1, 3.2, 3.3 and 3.4 in Handout 6.2) Does the organization's approach really target both Female And Male Operated Small enterprises?
- 4.3 Are the organization's procedures simple?
- 5.1 Is the equipment used by the organization appropriate for working with FAMOS?
- 5.2 Is sufficient time allocated for working with FAMOS clients?



## Questions addressed in Part B



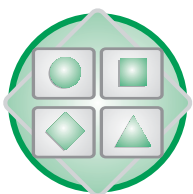
- 5.3 Is the organization's income from FAMOS clients sufficient to cover costs and generate profits?
- 5.4 Is the organization investing a significant amount in order to be able to provide services to FAMOS?

## Suggested time



Three to four hours

## Method



At least two facilitators will be required.

The exercise is based on a framework of four elements, respectively reflecting the organization's **strengths**, **weaknesses** (internal factors), **opportunities** and **threats** (external factors).

Some of the questions mentioned above may be analysed jointly, if this is feasible. It is important to focus on the most important issues facing the organization (a Diamond Analysis, done beforehand, can help to clarify these issues). At the end of the exercise, it should be possible to formulate practical actions.

## Preparation



If the participants are to be divided into small groups, flip charts with the SWOT diagram can be prepared in advance. If required, make copies of Handouts 6.1 and 6.2 for the participants. The questions chosen and the documents prepared for the SWOT analysis should be typical of the organization's attitude to FAMOS clients. In particular, attention should be paid to the organization's attitude to women entrepreneurs, and this could be used as a point of reference during the SWOT exercise. This analysis should also ensure that the participants take a critical look at their organization's documentation. Some issues can be identified in advance by doing a Diamond Analysis.

## Flip chart

**SWOT Analysis Exercise**

**Goal:** To assess the strengths and weaknesses of the services provided by the organization, and identify opportunities and threats or constraints.

**How:** Using an organizational analysis checklist (see Handout 6.2), analyse the strengths and weaknesses of the organization's activities/services and identify opportunities and threats or constraints.

### Suggested materials



- Flip charts
- SWOT checklist (see Handout 6.2)
- Markers of two colours
- Some documents typical of the organization, if they are readily available

### Tips for facilitating



At the start of the session, remind the participants of the goal of this exercise – specifically emphasizing issues that have been identified as important.

The first part of this exercise can be done either in a plenary session or in small groups. The second part of the exercise should be conducted as a discussion in the plenary session. Participants should analyse the strengths and weaknesses of their own organization's activities and services, assisted by the organizational analysis checklist (see Handout 6.1). They can then identify contextual opportunities and threats. This can be done on flip charts prepared in advance by the facilitator. These charts can then be shared with all participants in a plenary session.

Because participants are in many cases familiar with this SWOT method, they can often complete it on their own. Facilitators can be observers or act as “devil's advocates”.

Participants should first consider the issues listed in Handout 6 under “Find out about”, then try to identify ways of improving organizational performance, using the following questions for guidance:

- How can the organization's strengths be increased?
- How can weaknesses in the organization be reduced/overcome?
- How can existing opportunities be leveraged and exploited?
- How can the organization overcome existing threats, constraints and barriers?

If participants are working in small groups or individually, these questions should be posted somewhere clearly visible so they can be easily referred to.

Using this SWOT analysis, participants will be able to identify the most important strategic activities that can contribute to strengthening the organization's performance in delivering services to FAMOS clients in general and women entrepreneurs in particular.



**Before moving on, check that all the participants have understood the method and how it should be used.**

## Handout 6.1

## SWOT Organizational Analysis Checklist

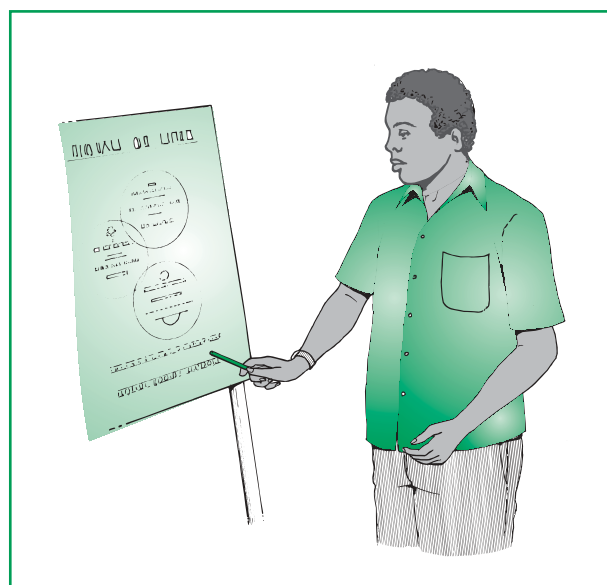
All aspects of SWOT (as shown below) need to be considered in the context of the activities that promote FAMOS

<b>Legal status and profile</b>	Legal status of the organization; profile; corporate identity
<b>External relationships</b>	Cooperation with other organizations; networking
<b>Mission</b>	The organization's rationale
<b>Objectives</b>	What the organization wants to achieve
<b>Strategies</b>	How the organization seeks to achieve its objectives
<b>Activities/programmes</b>	Tasks undertaken to implement the organization's strategies and achieve its objectives
<b>Structure</b>	Organizational chart; positions in the organization; division of tasks; responsibility and authority
<b>System</b>	Procedures and tools for programme analysis, planning, monitoring and evaluation; decision-making processes within the organization
<b>Personnel</b>	Personnel within the organization; recruitment; career prospects; selection and training opportunities
<b>Knowledge and information</b>	Knowledge and information produced, managed and accessible within the organization
<b>Resources</b>	Financial and material infrastructure (including, for example, access to capital, credit, technology, BDS)
<b>Organizational culture</b>	Attitudes, behaviour, values and norms of the organization's staff; its identity and history

## Handout 6.2

### Organizational Analysis Checklist Based on the questions set out in Part B

- 
- 2.2.1** Are the organization's methods of delivering support services appropriate for FAMOS clients?
- 
- 2.2.2** Is the organization's expertise reflected in the promotional materials and brochures it hands out to FAMOS?
- 
- 2.2.3** Does the organization have trained staff and technical expertise for the activities and services it provides to FAMOS clients?
- 
- 3.1** Does the organization know what activities and services are required by both Female And Male Operated Small enterprises?
- 
- 3.2** Are the brochures and other information on the organization's services suitable for and appealing to FAMOS clients?
- 
- 3.3** Are the organization's service packages suitable for FAMOS clients?
- 
- 3.4** Are the organization's pricing strategies appropriate for FAMOS clients?
- 
- 4.3** Are the organization's procedures simple?
- 
- 5.1** Is the equipment used by the organization appropriate for working with FAMOS?
- 
- 5.3** Is the organization's income from FAMOS clients sufficient to cover costs and generate profits?
- 



## Handout 7

## Mind-Mapping Exercise



## Find out more about



- why decisions concerning services for FAMOS and gender mainstreaming have or have not been taken;
- the organization's existing expertise in enhancing competence and capacity building for FAMOS and, in particular, for women entrepreneurs;
- the organization's policy and strategy for FAMOS as reflected in its products/services and in its public image;
- decision-making on FAMOS within the organization;
- the organization's culture.

## Questions addressed in Part B



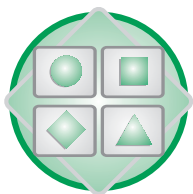
- 2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?
- 2.2.4 Have FAMOS clients experienced improvements in their businesses resulting from the organization's activities and services (including follow-up evaluation, after-sales service)?
- 3.1 Does the organization know what activities and services are required by both Female And Male Operated Small enterprises?
- 3.3 Are the organization's service packages suitable for FAMOS clients?
- 3.4.1 Can FAMOS clients afford the prices charged by the organization?
- 3.4.2 Are the organization's activities and services financially sustainable, considering the prices charged?
- 5.3 Is the organization's income from FAMOS clients sufficient to cover costs and generate profits?
- 5.4 Is the organization investing a significant amount in order to be able to provide services to FAMOS?
- 6 Do the organization's strategies, plans and objectives highlight its work for FAMOS?

### Suggested time



Two hours

### Method



At least two facilitators will be required.

Hold a brainstorming session to draw up an inventory of decisions to be taken, activities to be undertaken, and results to be achieved. These should be prepared in relation to the issues already mentioned above. The inventory or list is written on a flip chart.

#### **Suggested steps:**

##### **Step one:**

Participants give their opinions on how their organization deals with FAMOS issues. In the middle of the Mind Map they write down their ideas and the issues that relate to these ideas.

##### **Step two:**

The facilitator writes down or draws these ideas using symbols on lines that radiate from the centre of the diagram. Alternatively, they can be written or drawn by small groups or by individual participants.

##### **Step three:**

For each of the main radial lines, participants are asked to think of more detailed ideas that describe the lines more accurately, and to provide more information on how the organization's behaviour and outputs could develop further.

##### **Step four:**

These details are written or drawn onto the corresponding lines.

##### **Step five:**

Taking the ideas that relate to the organization's work with FAMOS, participants identify who works for FAMOS clients, who takes the decisions, and in cooperation with whom.

##### **Step six:**

When the drawing is complete, participants discuss the overall image presented and the issues it raises. If the exercise is carried out with a focus on the future, the discussion will centre on the commitments needed to carry out the required tasks.

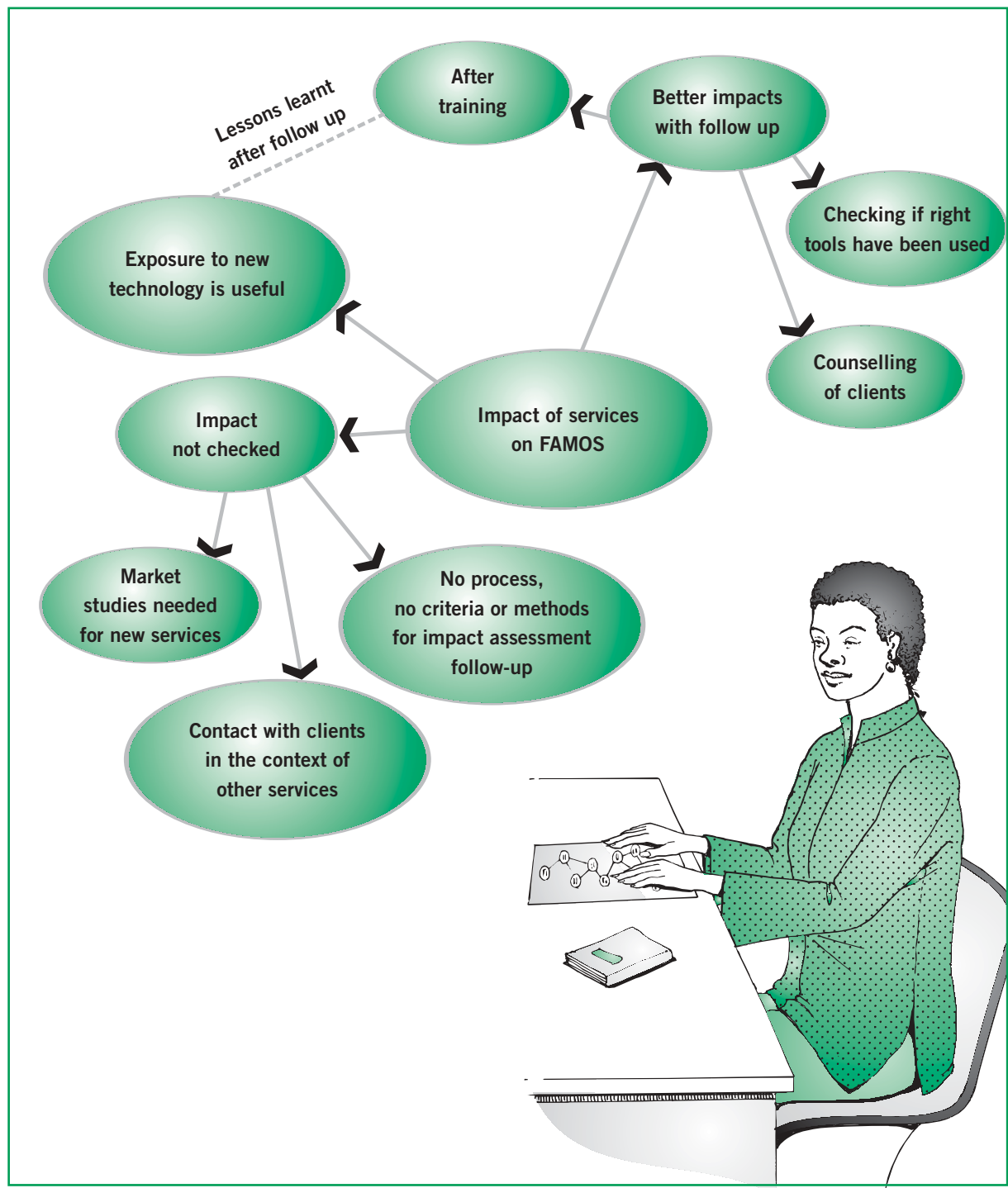
In starting the exercise, the facilitator could take as examples decisions that have been made by the organization in relation to some of the issues mentioned above.

## Preparation



Prepare flip charts with the images illustrated below, including the issue identified for special attention (e.g. the impact of services on FAMOS), which is written in the middle.

## Sample Image of Mind Mapping



### Flip chart



#### Mind Mapping

**Goal:** To identify innovative methods for delivering services to FAMOS.

**How:** Make an inventory of decisions or activities relating to FAMOS issues in the sector concerned.

### Suggested materials



- Flip chart
- Markers of different colours

### Tips for facilitating



Remind the participants about the goal of this exercise. This exercise can help participants to present their organization's services and the implementation of its FAMOS policy and service provision strategy.

The exercise reveals interconnections between decisions to be made and their expected results. It can help participants to see what types of decisions should be taken – or responsibilities assumed – in the future in order to help promote FAMOS development.

The mind-map image also serves to trigger other “layers” of thought. It is therefore recommended that participants be invited to use drawings as well as text during this exercise. The exercise can be conducted in a plenary session, or participants can be divided into small groups. In the case of small groups, each group should create a Mind Map, and choose someone to present their collective Mind Map later in the plenary session.

It is important to identify and include some cause-and-effect situations. The Mind Map can be useful as a planning tool, helping to focus on decisions that need to be taken in the future. It is also possible to use the Mind Map to trace the history of important decisions that have been taken in the past. Participants can choose the most important decision and draw a chart to illustrate its development.

The Mind Map takes less time than other planning tools and collates a lot of information from the participants in a very effective way. Any issue or idea can be analysed and organized by using Mind Mapping in such a way that linkages are quickly identified. The wording used on the Mind Map should be positive, as a positive formulation is more likely to lead to innovative and appealing solutions.



## Tips for facilitating



Questions for discussion can include:

- Are decision-making and responsibility shared equally throughout the organization and among the staff involved?
- Are decision-making and other responsibilities shared in such a way that the objectives of FAMOS in general, and women entrepreneurs in particular, are addressed and fulfilled?
- Are the decisions shared with all the staff and units involved?
- What types of decisions or responsibilities are not taken or not implemented?
- What needs to be improved?



**Before moving on, check that all the participants have understood the method and how it should be used.**

## Handout 8

### Preparing Logical Action Plans (LAPs)



#### Find out more about



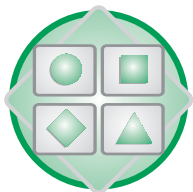
- the organization's current strategy;
- the organization's future strategy with regard to services for FAMOS.

#### Suggested time



Three hours

#### Method



At least three facilitators will be required.

Form a working group (the more diverse the group is in terms of people's backgrounds, the better).

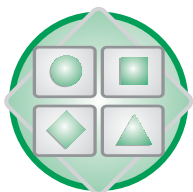
Do a problem analysis (as shown on page 85), by formulating the problems in a negative way.

The problems are then turned into positive formulations. A diagram of overall objectives, as well as general and specific objectives, is prepared. Overall objectives are broad in scope and cannot be achieved by a single initiative. They must be broken down into more specific sub-objectives that are more likely to be achieved through individual initiatives. Initiatives can be time-bound or continuous, depending on the nature of the objective concerned (as shown on page 85).

The activities can be formulated around specific objectives. A strategy is outlined by breaking down overall objectives into both (a) general and (b) specific objectives, and finally into a number of activities.

The objectives that are shown at the lowest level of the objective diagram (i.e. the specific objectives) actually describe the means by which the overall and general objectives can be achieved.

## Method



The first column of the Logical Action Plan (a sample LAP is shown on page 86) can be filled out after a general objective has been chosen. This general objective will be broken down into more specific objectives, which are listed below it. Below the first specific objective and its related activities, write the second specific objective and the activities associated with it.

## Preparation



The LAP is completed by filling in the appropriate cells at each level<sup>22</sup>: who is responsible and with whom?; when and for how long?; what verifiable indicators of performance and achievement are used?; and what resources are required? (see example of LAP on page 86).

Suggestions for major issues that the group could work on in the problem analysis should be identified in advance.

Flip charts of the problem analysis and the objective and strategy diagrams should be prepared (as shown on page 85), as well as large sheets of paper for the LAPs (one for each group and for each general objective analysed).

## Flip chart

**Logical Action Plan**

**Goal:** To define strategies for the three most important issues identified through the FAMOS Check.

**How:** Make a problem analysis and draw up an objectives strategy (as shown on page 85), and fill in the LAP framework.

## Suggested materials



- Flip chart 1: Logical Action Plan
- An example of an LAP (as shown on page 86)
- Markers; blank flip charts

<sup>22</sup> The cells are filled in at each level in such a way that it is immediately clear who is responsible, and for what. A “manager” with general responsibilities and individual “staff members” responsible for specific objectives or groups of activities will be immediately identifiable.

### Tips for facilitating



Before starting work on the Logical Action Plan, prioritize the issues that were mentioned during the document analysis, the interviews and especially the workshop process. The three most important issues should form the basis for the problem analysis.

**Working Group(s):** When forming working groups to prepare a LAP, try to form four separate and diverse groups, as suggested below.

- Involve colleagues from various departments of the organization.
- External consultants can be invited to provide an objective view.
- People from other similar organizations can also perform this function. A mutual agreement to participate in a similar exercise at any counterpart organization could be reached in advance (i.e. peer consulting).
- Current clients or potential clients of the organization (both women and men who are small enterprise operators) can be invited to participate.

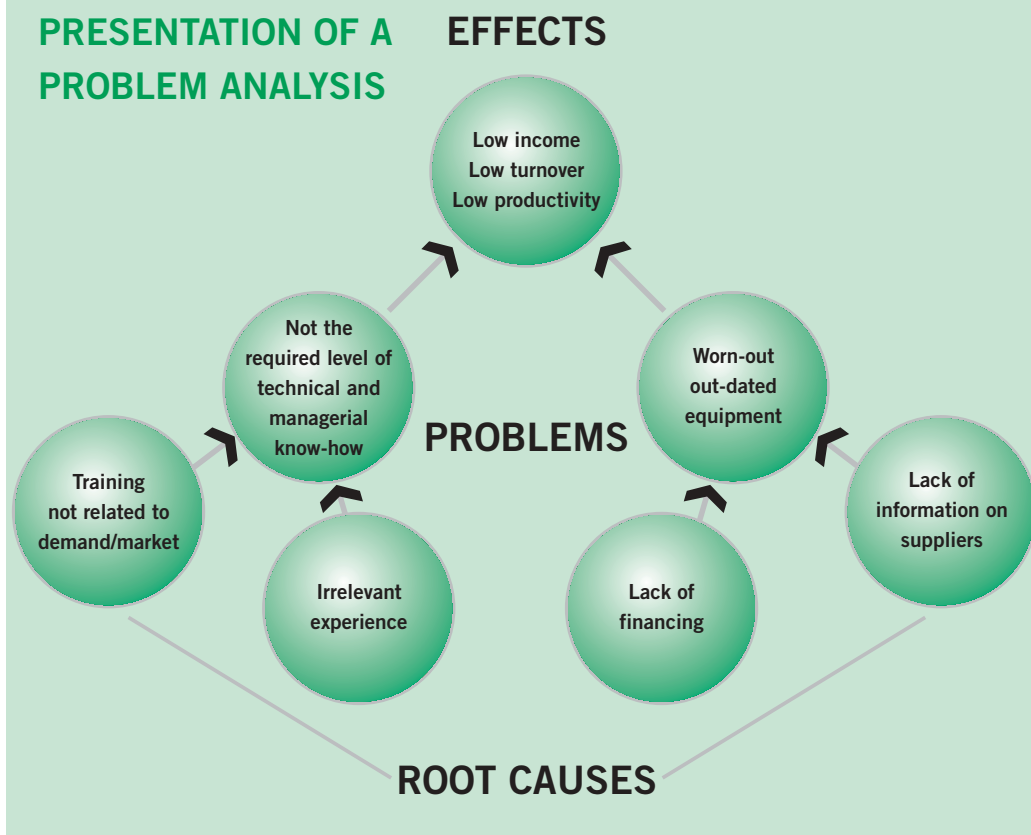
The working groups should preferably comprise more than one of these categories. Ideally, the participation of colleagues (if appropriate, from various departments) should be complemented with the presence of some external parties. The views of (potential) clients can also be extremely valuable in this context.

When implementing a Logical Action Plan, it often becomes clear that the objectives and activities of the LAP were too broadly formulated; they should have been described in more detail. More detailed activity plans can therefore be formulated to develop and elaborate on the initial LAP, showing all of the indicators and people involved. A more comprehensive Action Plan can then be produced, with details of the timing and resources needed for all the proposed activities.



**Before moving on, check that all the participants have understood the method and how it should be used.**

## PRESENTATION OF A PROBLEM ANALYSIS



## OBJECTIVES AND STRATEGY



### Example of Logical Action Plan

Overall Objective: Higher Income and Improved Productivity by FAMOS

	Intervention logic	Who and with whom?	When and how long?	Verifiable indicators	Resources required
<b>General Objective</b>	<b>Modern and appropriate equipment in place</b>				
<b>First Specific Objective</b>	<b>Access to appropriate funding</b>				
<b>Activities</b>	<ol style="list-style-type: none"> <li>1 Establish a leasing mechanism with a revolving fund.</li> <li>2 Put in place the necessary administrative procedures and equipment for the leasing mechanism.</li> <li>3 Train potential borrowers (male, female) to understand the positives and negatives of leasing.</li> </ol>				
<b>Second Specific Objective</b>	<b>Consulting on technical and managerial processes</b>				
<b>Activities</b>	<ol style="list-style-type: none"> <li>1 Train consultants, who subsequently qualify, to contact companies on appropriate equipment; work processes; product design; quality control; packaging.</li> <li>2 Install a system whereby companies receive cheaper consultation of high quality (e.g. pool of consultants; part of fees paid by project; consultants waive payment for first five hours of consultancy; voucher system).</li> </ol>				

## Handout 9

## Document Analysis



## Find out more about



how prepared the organization is to actually work with FAMOS, by analysing the following:

- CVs of the organization's staff and consultants;
- the organization's training materials;
- its policy and strategy documents;
- brochures produced to promote services to FAMOS clients;
- the organization's handbook and procedures;
- written materials on its range of services;
- any relevant documents that can help provide a "short financial analysis".

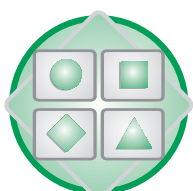
(The tables in Handout 9.1 provide a list of the questions set out in Part B, which are also linked to the seven categories of documents shown above)

## Suggested time



One to two days

## Method



At least two document analysts will be required.

Take the most important samples from each category of documents, or take a random sample. In most organizations, an analysis of all documents would take too long. In the FAMOS Check, the emphasis is on reviewing the documents that relate more directly to the workshop processes.

## Preparation



Copy the tables set out in Handout 9.1. At the top of the handout, write which document is being analysed and fill out the questions using the spaces provided.

### Flip chart



#### Document Analysis

**Goal:** To understand how FAMOS strategies are or are not reflected in the organization's documentation.

**How:** Make an inventory of issues and opportunities for improvement in relation to serving both women and men entrepreneurs.

### Suggested materials



The questions listed in the table can be modified and/or added to so as to have greater relevance to the issue(s).

- Required number of "Document Analysis Tables"
- Set of documents to be scrutinized

### Tips for facilitating



The purpose of analysing an organization's documentation is to provide both quantitative and verifiable information for baseline data. This will complement the results of the facilitated workshops. Information gathered during the document analysis can be used in helping plan the workshops. It can also serve as material for discussion and appraisal by participants.

For the FAMOS Check, seven categories of documents are identified (as shown on page 87). From these categories, select the documents that are most often used and referred to within the organization. If this is not possible or feasible, take random samples.

If there are documents that do not fall within any one of these categories, add an extra one by referring to questions 1 and/or 5 in the FAMOS Check Guide.

The staff's curricula vitae (CVs) should be analysed anonymously, by combining the results in a single table. As well as ticking the appropriate column, insert the number of CVs that contributed to answering the question(s) (e.g. if there are 3 curricula vitae for which "no" is the appropriate response to the first question, "3" should also be written in the cell concerned).

For the financial questions, a short financial analysis of the organization's financial statements should be carried out. Only then can the "Short Financial Analysis" section be filled in.



**Before moving on, check that all the participants have understood the method and how it should be used.**



## Handout 9.1

## Document Analysis Table

This table can serve as an aid to assessing documents and text for FAMOS sensitivity during the document review. The table should be used flexibly; the column for explanatory comments can be useful for noting details – especially when “to some extent” or “not enough information” has been ticked. If “not applicable” is ticked, it may be useful to indicate why the FAMOS questions are not applicable. If “no” is ticked, then the question “If not, why not?” can often generate revealing information.

The fifth column in the table, “unable to answer”, indicates insufficient information to justify a comment.

Document title	Curricula Vitae						
From	Professional title or position (no name)						
Other remarks	Make the analysis anonymously						
Criterion		Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
2.1 Does the organization have sufficient knowledge of FAMOS?							
2.1.1 Do staff in the organization have awareness of and training in servicing FAMOS clients?							
2.1.2 Do those employed in the organization have experience in working with FAMOS? ■ Are the staff aware of the particular opportunities and barriers facing women entrepreneurs? ■ Do the organization's staff recognize and understand the various opportunities and barriers specific to different sizes of FAMOS (i.e. micro, small, medium)? ■ Do staff in the organization recognize and understand the opportunities and barriers specific to FAMOS operating in different sectors (e.g. the agro-processing sector)? ■ Do staff in the organization know how many women and men are working with FAMOS within the organization?							
2.2.3 Does the organization have trained staff and technical expertise for the activities and services it provides to FAMOS clients?							

Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
<p>2.2.5 Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?</p> <ul style="list-style-type: none"> <li>■ How many of the organization's staff are women?</li> <li>■ How many managers are female and how many male?</li> <li>■ Do the female employees provide professional assistance to female and male clients alike?</li> <li>■ Do both male and female employees specialize in supporting women entrepreneurs?</li> </ul>						
<p>4.2 Is simple language used in the organization's documents and training materials? – and is it inclusive of both women and men?</p> <ul style="list-style-type: none"> <li>■ Are the staff trained to express themselves and communicate clearly, and do they adapt their language according to their clients' needs/preferences?</li> <li>■ Is the language used by the staff in everyday interaction "gender neutral", or does it make specific reference to both women and men?</li> <li>■ Do the training materials use clear and simple language, pictures, graphics, etc.?</li> <li>■ Does the organization use a variety of means to communicate its messages clearly?</li> </ul>						

Document title	Internal Training Material						
Name of document	Training Manual (1)						
Other remarks	Fill in one table for each document scrutinized						
Criterion		Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
2.1.4 Is the organization's expertise in working with FAMOS reflected in its internal training materials? <div><div>■ Are the barriers that women and men entrepreneurs face taken into account in the organization's internal training materials (including barriers related to sector, size and stage in the life cycle of the business)?</div><div>■ Through the activities and services offered by the organization, does it propose and offer solutions?</div><div>■ Are the solutions proposed based on the specific problems experienced by (a) female- and (b) male-operated small enterprises?</div></div>							

Document title	Policy and Strategy Document, Activity Reports						
Name of document	(to be completed)						
Other remarks	Fill in one table for each document scrutinized						
Criterion		Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
1.1	What percentage of the organization’s overall clientele consists of FAMOS clients and beneficiaries? Is it above or below 30%?						
1.2	What proportion of FAMOS clients/beneficiaries are women and men respectively? What sector(s) do they operate in? What is the size of their enterprise (MSME)?						
1.3	How familiar are FAMOS with the organization? Is the organization well known to FAMOS within its area of operation (locally and nationally)?						
2.1	Does the organization have sufficient knowledge of FAMOS?						
2.1.1	Do staff in the organization have awareness of and training in servicing FAMOS clients?						

Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
<p>2.1.2 Do those employed in the organization have experience in working with FAMOS?</p> <ul style="list-style-type: none"> <li>■ Are the staff aware of the particular opportunities and barriers facing women entrepreneurs?</li> <li>■ Do the organization's staff recognize and understand the various opportunities and barriers specific to different sizes of FAMOS (i.e. micro, small, medium)?</li> <li>■ Do staff in the organization recognize and understand the opportunities and barriers specific to FAMOS operating in different sectors (e.g. the agro-processing sector)?</li> <li>■ Do staff in the organization know how many women and men are working with FAMOS within the organization?</li> </ul>						
6.1 Does the organization have specific Action Plans (or components of its Action Plans) for its work with FAMOS?						
6.2 Does the organization have indicators for measuring the quality and extent of its work with FAMOS?						
6.3 Does the organization allocate a budget for working with FAMOS?						

Document title	Materials and Brochures for FAMOS					
Name of document	(to be completed)					
Other remarks	Fill in one table for each document scrutinized					
Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
2.1.4 Is the organization's expertise in working with FAMOS reflected in its internal training materials?						
2.2.2 Is the organization's expertise reflected in the promotional materials and brochures it hands out to FAMOS? <ul style="list-style-type: none"> <li>Are the promotional materials for FAMOS easily understood by clients?</li> <li>Can the materials be used easily by these FAMOS clients?</li> </ul>						
2.2.4 Have FAMOS clients experienced improvements in their businesses resulting from the organization's activities and services (including follow-up evaluation, after-sales service)? <ul style="list-style-type: none"> <li>Is there any follow-up evaluation after the organization's activities or services have been offered/provided to FAMOS?</li> <li>Does the organization provide any kind of after-sales support service for FAMOS?</li> <li>Does feedback from FAMOS clients reach the organization's employees and managers, e.g. on the quality of the activities and services?</li> <li>Is this information from FAMOS clients used to improve the organization's activities and services?</li> <li>Does the organization have FAMOS clients who come back regularly to request further activities and services?</li> </ul>						

Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
<p>3.2 Are the brochures and other information on the organization's services suitable for and appealing to FAMOS clients?</p> <ul style="list-style-type: none"> <li>■ Does the organization explain its approach (how it wants to assist FAMOS) in a way that enables FAMOS clients to make the right choices regarding the activities and services that they need and want?</li> <li>■ Do the brochures illustrate the promotional and business development messages in a way that is meaningful to FAMOS clients?</li> </ul>						
<p>4.2 Is simple language used in the organization's documents and training materials? — and is it inclusive of both women and men?</p> <ul style="list-style-type: none"> <li>■ Are the staff trained to express themselves and communicate clearly, and do they adapt their language according to their clients' needs/preferences?</li> <li>■ Is the language used by the staff in everyday interaction "gender neutral", or does it make specific reference to both women and men?</li> <li>■ Do the training materials use clear and simple language, pictures, graphics, etc.?</li> <li>■ Does the organization use a variety of means to communicate its messages clearly?</li> </ul>						



Document title	The Organization's Handbooks and Procedures					
Name of document	(to be completed)					
Other remarks	Fill in one table for each document scrutinized					
Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?						
2.2.4 Have FAMOS clients experienced improvements in their businesses resulting from the organization's activities and services (including follow-up evaluation, after-sales service)?						
3.1 Does the organization know what activities and services are required by both Female and Male Operated Small enterprises? <ul style="list-style-type: none"> <li>Does the organization carry out market assessments (e.g. ILO's Rapid Market Appraisal) to ensure that research, analysis and presentation of information about FAMOS are timely, relevant, understandable and applicable?</li> <li>Can the organization identify the services required by FAMOS clients?</li> <li>Does the organization use client feedback systems?</li> <li>Does the organization have procedures to encourage innovation in approach, outreach, activity and service?</li> <li>Does the organization encourage employees of all ages and all hierarchical levels to suggest improvements, and to get involved in testing new ideas?</li> </ul>						

Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
<p>4.1 Is communication with FAMOS clients friendly?</p> <ul style="list-style-type: none"> <li>■ Do all staff in the organization know how to behave towards FAMOS clients (women, men; small/large enterprises; people with disabilities; people living with HIV and AIDS; people from different ethnic groups, etc.)? Have all staff (including security personnel) received training to develop correct attitudes towards FAMOS clients?</li> <li>■ Do the organization's service providers understand the circumstances in which their FAMOS clients live and work?</li> <li>■ Does the organization consciously promote the values of respect and tolerance?</li> <li>■ Is the dress code of employees appropriate for the organization's FAMOS clients?</li> <li>■ Are the buildings welcoming or unwelcoming to FAMOS clients?</li> </ul>						
<p>4.3 Are the organization's procedures simple?</p> <ul style="list-style-type: none"> <li>■ Is it clear to FAMOS clients and people outside the organization as to whom they should contact in the organization, and for what purpose?</li> <li>■ Are the structures and procedures of the organization clear and transparent to its FAMOS clients?</li> </ul>						

Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
<p>4.4 Do FAMOS services have sufficient status and importance within the organization? – and is this reflected at the strategic level?</p> <ul style="list-style-type: none"> <li>■ Does the organization have enough staff to effectively deliver its services to FAMOS clients?</li> <li>■ Do the relevant heads of department have enough authority and resources to be able to implement appropriate activities and services for FAMOS clients?</li> <li>■ Does the organization have enough physical space and work materials to deliver its services to FAMOS clients?</li> </ul>						
<p>4.6 Is the organization accessible for FAMOS?</p> <ul style="list-style-type: none"> <li>■ Can FAMOS clients afford the time and money required to visit the organization, participate in its activities and access its services?</li> <li>■ Do FAMOS need to have a certain level of knowledge in order to participate in the organization's activities and access its services? Is this a barrier?</li> <li>■ Is the prevailing attitude within the organization welcoming and gender-sensitive, rather than dominated by particular cultural, social or gender stereotypes?</li> <li>■ Are the organization's offices close to residential or business areas? Are they accessible to people with physical disabilities?</li> <li>■ Are the organization's offices in a safe and secure area where women are unlikely to suffer harassment or threats?</li> </ul>						
<p>5.2 Is sufficient time allocated for working with FAMOS clients?</p>						

Document title	Services: Written Material					
Name of document	(to be completed)					
Other remarks	Fill in one table for each document scrutinized					
Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
2.2.5 Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?						
3.3 Are the organization’s service packages suitable for FAMOS clients? ■ Does the organization package its services in a way that is useful to its FAMOS clients? ■ Does the organization know what impact its service packages have on the performance of its FAMOS clients (see also question 2.2.4), e.g. increase in profits and sales; reduction in costs; increase in company assets; increase in jobs created, etc.? ■ Does the organization change or modify its services regularly to meet the changing requirements of FAMOS clients? ■ Does the organization have “vertically” and “horizontally” integrated services?						

Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
3.4.1 Can FAMOS clients afford the prices charged by the organization? <ul style="list-style-type: none"><li>■ Does the organization package its services so that FAMOS clients can easily afford them?</li><li>■ Does the organization offer flexible payment terms and systems?</li><li>■ Does the organization have a clear pricing strategy that encourages FAMOS clients to purchase its services?</li><li>■ Does the organization have different pricing strategies for different groups or segments of FAMOS?</li></ul>						

Document title	Short Financial Analysis					
Name of document	(to be completed)					
Other remarks	Analyze the financial details of the organization, then fill out this table					
Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?						
3.4.2 Are the organization's activities and services financially sustainable, considering the prices charged? <ul style="list-style-type: none"> <li>Does the organization have pricing strategies (e.g. high volume/low price, or low volume/high price)?</li> <li>Are the organization's current pricing strategies sustainable (i.e. at least covering the organization's costs, and perhaps generating some profit), or does it plan to introduce sustainable pricing strategies in the future?</li> <li>Does the organization cross-subsidize its FAMOS services (e.g. by charging more for services delivered to larger enterprises or the public sector)?</li> </ul>						
5.3.1 Is the organization self-sustainable through its sales to/income from FAMOS?						
5.3.2 Are the organization's costs arising from its work for FAMOS clients low? Are profits generated from working with FAMOS? Is the organization working efficiently?						

Criterion	Yes	No	To some extent	Unable to answer	Not applicable	Explanatory comments
5.3.3 Does the organization receive any subsidies or project funds to support its work with FAMOS? <div><div>■ What percentage of income does the organization receive as a subsidy for its work with FAMOS in terms of the organization's total income?</div><div>■ Does the organization expect to receive a subsidy for its work with FAMOS in the future?</div><div>■ In its financial planning, is the organization reliant on subsidies?</div><div>■ Is the organization trying to establish sustainable FAMOS activities and services (i.e. activities and services that can continue without subsidies or project funds)?</div></div>						
5.4 Is the organization investing a significant amount in order to be able to provide services to FAMOS?						

### Handout 10

### Interview Methods

### Semi-Structured Individual or Group Interviews



#### Find out more about



- the organization's FAMOS clients;
- the organization's approach to knowledge management;
- the way it adapts services to the needs of FAMOS clients;
- if the organization mainstreams gender equality in implementing its strategy and providing services;
- the sustainability of the organization's work with FAMOS clients.

#### Questions addressed in Part B



- 1 Does the organization actually have FAMOS as clients/beneficiaries?
  - 2.1.1 Do staff in the organization have awareness of and training in servicing FAMOS clients?
  - 2.1.4 Is the organization's expertise in working with FAMOS reflected in its internal training materials?
  - 2.1.5 Do the organization's staff know how to adapt its activities and services to FAMOS?
  - 2.2.4 Have FAMOS clients experienced improvements in their businesses resulting from the organization's activities and services (including follow-up evaluation, after-sales service)?
  - 2.2.5 Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?
- 3.1 Does the organization know what activities and services are required by both Female And Male Operated Small enterprises?
- 3.3 Are the organization's service packages suitable for FAMOS clients?
  - 3.4.1 Can FAMOS clients afford the prices charged by the organization?
  - 3.4.2 Are the organization's activities and services financially sustainable, considering the prices charged?
- 4.1 Is communication with FAMOS clients friendly?



## Questions addressed in Part B



- 4.4 Do FAMOS services have sufficient status and importance within the organization? – and is this reflected at the strategic level?
- 4.5 Are the organization's staff motivated to work with FAMOS clients?
- 5.1 Is the equipment used by the organization appropriate for working with FAMOS?
- 5.2 Is sufficient time allocated for working with FAMOS clients?
- 5.3 Is the organization's income from FAMOS clients sufficient to cover costs and generate profits?
- 6 Do the organization's strategies, plans and objectives highlight its work for FAMOS?

## Questions addressed in Part A



- 2.2.1 Are the organization's methods of delivering support services appropriate for FAMOS clients?
- 2.2.2 Is the organization's expertise reflected in the promotional materials and brochures it hands out to FAMOS?
- 3.4.1 Can FAMOS clients afford the prices charged by the organization?
- 3.4.2 Are the organization's activities and services financially sustainable, considering the prices charged?
- 4.1 Is communication with FAMOS clients friendly?
- 4.2 Is simple language used in the organization's documents and training materials? — and is it inclusive of both women and men?
- 4.3 Are the organization's procedures simple?
- 4.6 Is the organization accessible for FAMOS?

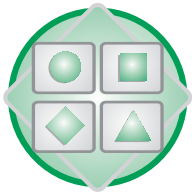
These questions should be explored by interviewing key FAMOS clients. This activity can also be done with small groups.

## Suggested time



One hour per person, or two hours for each group being interviewed.

### Method



At least two interviewers will be required.

Collect information on the basis of the questions set out in Part B and listed in Handout 10.

### Preparation



Questions can be prepared using the information gained from the document analysis check. They should be based on the sample questions framed under each topic (see Part B).

### Flip chart



#### Group Interview

**Goal:** To collect information about the attitudes of the organization's staff to FAMOS clients.

**How:** Questions and subsequent discussion with participants.

### Suggested materials



- List of prepared questions or notes (e.g. on cards) on which to base questions
- Handouts about the organization and its services (e.g. brochures)

### Tips for facilitating



#### Planning the interview:

- Choose a suitable and convenient time and location. Set a specific time and place for the interview (it can be scheduled at any time during the FAMOS Check week, when managers/directors, key employees and key clients will be available).
- Interview one to three people at a time, otherwise it becomes more like a workshop.
- Prepare questions beforehand using the FAMOS Check Guide. Particularly important questions can be written out on cards.
- Be clear about the basic roles, duties and responsibilities of the person(s) interviewed —the “boss” should be interviewed by the most senior person in the FAMOS Check team.
- The interviewer should be on time for each interview, and stick to an agreed time-limit (e.g. 45 minutes).

## Tips for facilitating

**Opening the discussion:**

- Confirm that the right person is being interviewed.
- Introduce the FAMOS Check and explain its goals and process (as set out in Part A).
- Explain the purpose of the discussion and interview, and how the information will be used (as anonymous information it will be included in the overall FAMOS Check Report, which follows the structure of Part B of the FAMOS Check Guide).

**Conducting the interview:**

- Ask the interviewee to give a brief overview of her or his work (duties, roles, etc.).
- Ask the “yes/no” questions indicated as interview questions in Part B of the FAMOS Check Guide, but seek qualitative and quantitative explanations for the “yes/no” answers given (maybe by asking probing questions, such as who? where? how?).
- Be flexible and rephrase questions as necessary.
- Try to get more specific answers if the replies are too general. Take care not to sound like an investigator.
- Take notes of all the information provided throughout the interview.
- Ask only one question at a time.
- Move from general topics to more specific and detailed areas of enquiry.
- Check that the interviewee’s responses show that she/he has understood the questions correctly, and that these responses have been recorded consistently.

**Closing the interview:**

- Do not exceed the agreed time-limit.
- Summarize the main points. This is to check that the interviewee’s responses have been correctly understood by the interviewer.
- End on a positive note and thank the interviewee(s).

**Documenting interview results:**

- Record the name, title and job description of the person interviewed.
- Take notes during the interview corresponding to the questions asked.
- Report the findings by pooling together all of the responses to a specific question, without mentioning any names. This meets the requirements of anonymity and confidentiality.



**Before moving on, check that all the interviewers have understood the method and how it should be used.**

### Handout 11

### Feedback Session Guide

### Handout 11.1

### Feedback on FAMOS Check



#### Find out more about



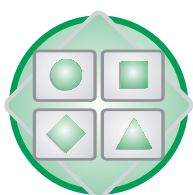
- the results of the FAMOS Check;
- points which can be improved upon;
- the organization's strategies, and how they can be improved upon;
- the first draft of an Action Plan;
- the path the organization should follow in order to formulate an Action Plan and implement it.

#### Suggested time



Two hours, two weeks after conducting the FAMOS Check

#### Method



At least two facilitators will be required.

Write the report following the sequence and format of the questions set out in Part B.

Attach the Action Plan, which will have been developed in the workshop session during the FAMOS Check.

Hold a Feedback Workshop with the managers and as many staff members of the organization as possible.

Finalize the overall report on the FAMOS Check and submit it to senior managers of the organization/unit.

## Preparation



The FAMOS Check report (including the annexed Action Plan) should be sent to both management and staff for comment (heads of departments should be included if it is a big organization). It should then be revised to take into account the comments, amendments and corrections received from managers and staff. The revised version should be sent out to all of these people at least three days before the FAMOS Check Feedback Workshop.

Make a list of the major decisions that need to be taken by the management of the organization.

## Flip chart

**Feedback on FAMOS Check**

**Goal:** To inform the leaders and the staff of the organization of the results of the FAMOS Check, and ensure that appropriate decisions are taken.

**How:** Present the report and facilitate final decision-making.

## Suggested materials



- FAMOS Check report
- List of major decisions to be taken
- Markers
- Flip charts

## Tips for facilitating



Make sure that the senior managers of the organization can participate in the Feedback Workshop, as it will be their task to facilitate and implement the necessary decisions to promote change in the organization.

If it is likely that the senior managers will take more concrete or specific decisions without other people from the organization being present, then it would be advisable to organize two Feedback Workshops (one for senior managers, one for staff).

Send out the revised draft report for comments. Ensure that the revised report reaches the organization at least three days before the Feedback Workshop.

Present the results of the report, but use the Feedback Workshop mainly as a means for securing the management's commitment and ensuring they take decisions on how to use the FAMOS Check report and implement the suggested Action Plan. Prepare a list of ideas in advance, but allow plenty of opportunity for the participants to make their own suggestions.

### Handout 11.2

### FAMOS Check Refresher Meeting (One year after the initial FAMOS Check)

#### Find out more about



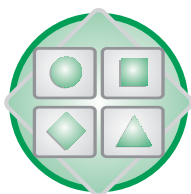
- How did the organization use the FAMOS Check report and the suggested Action Plan?
- Has the organization's work with both Female And Male Operated Small enterprises improved during this time?
- Has the organization developed innovative interventions/services for working with Female And Male Operated Small enterprises as a whole, and for individual segments (women or men; micro or small; rural or urban)?
- What are the current issues and concerns within the organization concerning FAMOS, and women entrepreneurs in particular?
- How would the organization like to continue and further develop its work with both Female And Male Operated Small enterprises?

#### Suggested time



One day  
(about one year after the first FAMOS Check)

#### Method



At least three facilitators will be required.

Invite management and staff to a workshop to review the original process and subsequent results, in terms of the issues set out above.

The following methods can be used:

- Historical Time-line (with the FAMOS Check as the starting point)
- The current FAMOS/Gender culture of the organization (Hofstede's Onion)
- SWOT analysis regarding the strengths, weaknesses, opportunities and threats associated with the organization's current services and procedures
- Mind Mapping to discuss opportunities for further improvement
- (Revised) Logical Action Plan for the coming period (e.g. 1-2 years)

## Preparation



Prepare to use some of the workshop methods again during the refresher workshop (refer to the explanations in Part C).

Prepare questions that are appropriate for examining the issues set out at the beginning of Handout 11.2. These can be used during the workshop.

Before the workshop, discuss briefly with management and key employees how the organization has taken the FAMOS Check results into account during the past year.

## Flip chart

**Refresher Meeting: FAMOS Check**

**Goal:** To find out if the work of the organization has improved, and if it more effectively meets the needs and demands of both Female And Male Operated Small enterprises.

**How:** Discuss different FAMOS approaches, activities and organizational issues.

## Suggested materials



- Markers
- Flip charts

## Tips for facilitating



Engage a team from the organization to prepare for the refresher meeting. Send out information on the FAMOS Check refresher meeting one week in advance.

When preparing for the meeting, refer to the FAMOS Check report and the Action Plan developed one year earlier.

To facilitate participation by both management and staff, send out the FAMOS Check report and the Action Plan once again in advance of the refresher meeting.

## REFERENCES AND BIBLIOGRAPHY

- Arthur D. Little: *Environmental, Health and Safety Auditing – Training Guide*, 1992
- Claudia Ulrike Gminder: *Gender-Oriented Entrepreneurship Promotion*, Part I + II, Swiss Development Cooperation, 2003
- Nyambilila Minga: “Marketing of processed agricultural goods”, Workshop in the United Republic of Tanzania “Adding Value to Agricultural Produce”, 2002
- Karin Reinprecht: *How to build a Logical Framework. A Training Guide*, Slovakia, 2001; and *Business Development Tools for the Austrian Development Cooperation*, Vienna, 2003
- Linda Wirth, Hettie Walters, Mandy Macdonald, Petra Ulshöfer, Adrienne Cruz (with Grania Mackie and Gerry Finnegan): *Participatory Gender Audit – Revised Guide for Auditors*, ILO Geneva, December 2002
- ILO/SEED: *Rapid Market Appraisal: A manual for entrepreneurs*, The FIT Manual Series, ILO Geneva, 2000

## WEDGE REPORTS AND PUBLICATIONS

### Published WEDGE Working Papers

- **Working Paper No. 9**  
Kantor, Paula: *Promoting Women's Entrepreneurship Development based on Good Practice Programmes: Some Experiences from the North to the South*, ILO/SEED, 2000
- **Working Paper No. 14**  
Karim, Nilufer Ahmed: *Jobs, Gender and Small Enterprises in Bangladesh: Factors Affecting Women Entrepreneurs in Small and Cottage Industries in Bangladesh*, ILO/SEED, 2001
- **Working Paper No. 15**  
Mayoux, Linda: *Jobs, Gender and Small Enterprises: Getting the Policy Environment Right*, ILO/SEED, 2001
- **Working Paper No. 18**  
Marcucci, Pamela Nichols: *Jobs, Gender and Small Enterprises in Africa and Asia: Lessons drawn from Bangladesh, the Philippines, Tunisia and Zimbabwe*, ILO/SEED, 2001



■ **Working Paper No. 19**

Ferdinand, Carol (ed.): *Jobs, Gender and Small Enterprises in the Caribbean: Lessons from Barbados, Suriname and Trinidad and Tobago*, ILO/SEED, 2001

■ **Working Paper No. 20**

Stoyanovska, Antonina: *Jobs, Gender and Small Enterprises in Bulgaria*, ILO/SEED, 2001

■ **Working Paper No. 21**

Bezhani, Mimoza: *Women Entrepreneurs in Albania*, ILO/SEED, 2001

■ **Working Paper No. 47**

Pat Richardson, Rhona Howarth and Gerry Finnegan: *The Challenges of Growing Small Businesses: Insights from Women Entrepreneurs in Africa*, ILO/SEED, 2004

■ **Working paper No. 58**

Day-Hookoomsing, Patricia; Essoo, Vedna: *Promoting Female Entrepreneurship in Mauritius: Strategies in Training and Development*, 2003

■ **ILO Hanoi Working Paper No. 1**

S. D. Barwa: *Impact of Start Your Business (SYB) Training on Women Entrepreneurs in Vietnam*, 2003

■ **Nepal and Pakistan Working Paper No. 69**

Maria Sabrina De Gobbi with contribution from Nara Hari Dhakal and Syed Tahir Hijazi: *Micro-finance and microenterprise development: Their contribution to the economic empowerment of women*, 2005

## SEED/WEDGE Reports and Research on Women Entrepreneurs

- Goheer, N.A.: *Women Entrepreneurs in Pakistan. How to Improve their Bargaining Power*, ILO, IFP/SEED/WEDGE, SAAT, ILO Islamabad, 2003

- Barney-Gonzales, M. J., Gebreselassie, T.: *Promoting Women's Entrepreneurship and Access to Markets Through Exhibitions and Trade Fairs*, ILO, IFP/SEED/WEDGE, 2002

- Barney-Gonzalez, Maria Jose: *A second review of the Women in Development Centres of the Ministry of Women's and Veterans' Affairs, Cambodia*, 2002

- *Promoting Women's Entrepreneurship through Employers' Organizations in the Asia-Pacific Region*, ILO, IFP/SEED/WEDGE, 2002 (Three parts – a, b, c)

- *Women Entrepreneurs in Ethiopia, a Preliminary Report*, Zewde and Associates, ILO, IFP/SEED/WEDGE; 2002
- *Women Entrepreneurs in Tanzania, a Preliminary Report*, University of Dar es Salaam Entrepreneurship Centre, ILO, IFP/SEED/WEDGE; 2002
- *Women Entrepreneurs in Zambia, a Preliminary Report*, JUDAI and Associates, ILO, IFP/SEED/WEDGE, 2002
- *Ethiopian Women Entrepreneurs: Going for Growth*, ILO, IFP/SEED/WEDGE & MOTI/WAD, 2003
- *Tanzanian Women Entrepreneurs: Going for Growth*, ILO, IFP/SEED/WEDGE & MIT/SME Section, 2003
- *Zambian Women Entrepreneurs: Going for Growth*, ILO, IFP/SEED/WEDGE & GIDD, 2003
- *L'entrepreneuriat féminin dans les îles de l'océan indien*, ILO, SEED/WEDGE & ILO Antananarivo, November 2004
- Lois Stevenson and Annette St-Onge: *Support for Growth-oriented Women Entrepreneurs in Ethiopia*, 2005
- Lois Stevenson and Annette St-Onge: *Support for Growth-oriented Women Entrepreneurs in Kenya*, 2005
- Lois Stevenson and Annette St-Onge: *Support for Growth-oriented Women Entrepreneurs in Tanzania*, 2005
- Stevenson, L.; St-Onge, A.: *Support for Growth-oriented Women Entrepreneurs in Ethiopia, Kenya and Tanzania: An Overview Report*, Joint ILO/AfDB Publication, September 2004

### Papers, Training and Briefing Notes

- Briefing Note: Mackie, Grania: *FAMOS Check, Gender Mainstreaming Tool for SME Policies*, 2004
- ILO Annual BDS Seminar Paper: Finnegan, Gerry: *Are W.E. Being Served? The Work of the International Labour Organization (ILO) in Promoting More and Better BDS for Women Entrepreneurs*, 2003
- OECD Conference Paper: Finnegan, Gerry: *Facilitating Women's Entrepreneurship: Lessons from the ILO's research and support programmes*, 2003
- Globalisation and Gender Briefs Series No 1: *Trade Liberalisation Policy*, ILO – IFP/SEED, Commonwealth Secretariat & ILO, 2003
- Globalisation and Gender Briefs Series No 2: *WTO TRIPS Agreement*, ILO – IFP/SEED, Commonwealth Secretariat & ILO, 2003

- Globalisation and Gender Briefs Series No 3: *Small and Medium Enterprise Development*, ILO – IFP/SEED, Commonwealth Secretariat & ILO, 2003
- Course Flyer: “Capacity Building Workshop on Women’s Entrepreneurship Development (Zambia)”, ILO/SEED, ILO International Training Centre, Turin, 2004
- Course Flyer: “Training for BDS Providers and Promoters of Women’s Entrepreneurship Development”, ILO – IFP/SEED, ILO International Training Centre, Turin, 2003
- Power Point Presentation: Finnegan Gerry: “The work of SEED’s WEDGE team”, A presentation that outlines WEDGE activities and partnerships, 2004
- Women’s Entrepreneurship Capacity Building Workshop, ILO/SEED, ILO International Training Centre, Turin, 2004
- Stevenson, L.; St-Onge, A.: *Assessing the Enabling-Environment for Women in Growth Enterprises: An AfDB/ILO Integrated Framework Assessment Guide*, Joint ILO/AfDB Publication, August 2004
- *Women’s Entrepreneurship Development Capacity Building Guide*, ILO/SEED, ILO International Training Centre, Turin; 2006
- Susanne Bauer, Gerry Finnegan and Nelien Haspels: *GET Ahead for Women in Enterprise Training Package and Resource Kit*, ILO, Bangkok, 2004
- Gerry Finnegan, Tadesse Selaissee and Grania Mackie: *Improve Your Exhibiting Skills – IYES*, 2006

It should be noted that the participants in the FAMOS Check workshop in Zanzibar in December 2003 made a valuable contribution to improving this Guide.

### APPENDIX – SUMMARY OF FAMOS CHECK

Methods to use	Question to ask
<b>Workshop:</b>	
Hofstede's Onion/ Culture Check	2.1.1 Do staff in the organization have awareness of and training in servicing FAMOS clients?
Historical Time-line Exercise	2.1.2 Do those employed in the organization have experience in working with FAMOS?
	2.2.5 Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?
	4.1 Is communication with FAMOS clients friendly?
	4.4 Do FAMOS services have sufficient status and importance within the organization? – and is this reflected at the strategic level?
	4.5 Are the organization's staff motivated to work with FAMOS clients?
FAMOS Knowledge and Awareness Quiz	2.1.1 Do staff in the organization have awareness of and training in servicing FAMOS clients?
	2.1.2 Do those employed in the organization have experience in working with FAMOS?
	2.1.5 Do the organization's staff know how to adapt its activities and services to FAMOS clients?
Diamond Analysis	1 Does the organization actually have FAMOS as clients/beneficiaries?
	2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?
	2.1.5 Do the organization's staff know how to adapt its activities and services to FAMOS clients?
	2.2.1 Are the organization's methods of delivering support services appropriate for FAMOS clients?
	4.1 Is communication with FAMOS clients friendly?
	4.2 Is simple language used in the organization's documents and training materials? — and is it inclusive of both women and men?
	5 Does the organization have sufficient resources for working with FAMOS?

Methods to use	Question to ask
Chapati Diagram Analysis	1.2 What proportion of FAMOS clients/beneficiaries are women and men respectively? What sector(s) do they operate in? What is the size of their enterprise (MSME)?
	1.3 How familiar are FAMOS with the organization? Is the organization well known to FAMOS within its area of operation (locally and nationally)?
	2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?
SWOT Analysis	2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?
	2.1.4 Is the organization's expertise in working with FAMOS reflected in its internal training materials?
	2.2.1 Are the organization's methods of delivering support services appropriate for FAMOS clients?
	2.2.2 Is the organization's expertise reflected in the promotional materials and brochures it hands out to FAMOS?
	2.2.3 Does the organization have trained staff and technical expertise for the activities and services it provides to FAMOS clients?
	3.1 Does the organization know what activities and services are required by both Female And Male Operated Small enterprises?
	3.2 Are the brochures and other information on the organization's services suitable for and appealing to FAMOS clients?
	3.3 Are the organization's service packages suitable for FAMOS clients?
	3.4 Are the organization's pricing strategies appropriate for FAMOS clients?
	4.3 Are the organization's procedures simple?
	5.1 Is the equipment used by the organization appropriate for working with FAMOS?
	5.2 Is sufficient time allocated for working with FAMOS clients?
	5.3 Is the organization's income from FAMOS clients sufficient to cover costs and generate profits?
	5.4 Is the organization investing a significant amount in order to be able to provide services to FAMOS?

Methods to use	Question to ask	
Mind-Mapping Exercise	2.1.3	Do the organization's staff know what activities and services are needed by FAMOS clients?
	2.2.4	Have FAMOS clients experienced improvements in their businesses resulting from the organization's activities and services (including follow-up evaluation, after-sales service)?
	3.1	Does the organization know what activities and services are required by both Female And Male Operated Small enterprises?
	3.3	Are the organization's service packages suitable for FAMOS clients?
	3.4.1	Can FAMOS clients afford the prices charged by the organization?
	3.4.2	Are the organization's activities and services financially sustainable, considering the prices charged?
	5.3	Is the organization's income from FAMOS clients sufficient to cover costs and generate profits?
	5.4	Is the organization investing a significant amount in order to be able to provide services to FAMOS?
	6	Do the organization's strategies, plans and objectives highlight its work for FAMOS?
Logical Framework for new or additional FAMOS Action Plans	6	Do the organization's strategies, plans and objectives highlight its work for FAMOS?
<b>Document analysis:</b>		
CVs	2.1	Does the organization have sufficient knowledge of FAMOS?
	2.1.1	Do staff in the organization have awareness of and training in servicing FAMOS clients?
	2.1.2	Do those employed in the organization have experience in working with FAMOS?
	2.2.3	Does the organization have trained staff and technical expertise for the activities and services it provides to FAMOS clients?
	2.2.5	Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?
	4.2	Is simple language used in the organization's documents and training materials? — and is it inclusive of both women and men?

Methods to use	Question to ask	
Internal Training Materials	2.1.4	Is the organization's expertise in working with FAMOS reflected in its internal (training) materials?
Policy and Strategy Documents, Activity Reports	1	Does the organization have FAMOS as clients/beneficiaries?
	2.1	Are the organization's delivery methods appropriate for FAMOS clients?
	2.1.1	Do staff in the organization have awareness of and training in servicing FAMOS clients?
	6	Do the organization's strategies, plans and objectives mention and highlight its work for FAMOS clients?
Materials and Brochures for FAMOS	2.1.4	Is the organization's expertise in working with FAMOS reflected in its internal (training) materials?
	2.2.4	Have FAMOS clients experienced improvements in their businesses resulting from the organization's activities and services?
	3.2	Are the brochures and other information on the organization's services suitable for and appealing to FAMOS clients?
	4.2	Is simple language used in the organization's documents and training materials? — and is it inclusive of both women and men?
The Organization's Handbooks and Procedures	2.1.3	Do the organization's staff know what activities and services are needed by FAMOS clients?
	2.2.4	Have FAMOS clients experienced improvements in their businesses resulting from the organization's activities and services?
	3.1	Does the organization know what activities and services are required by both Female And Male Operated Small enterprises?
	4.1	Is communication with FAMOS clients friendly?
	4.3	Are the organization's procedures simple?
	4.4	Do FAMOS services have sufficient status and importance within the organization? – and is this reflected at the strategic level?
	4.6	Is the organization accessible for FAMOS?
	5.2	Is sufficient time allocated for working with FAMOS clients?

Methods to use	Question to ask
Services: Written Material	<p>2.2.5 Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?</p> <p>3.3 Are the organization's service packages suitable for FAMOS clients?</p> <p>3.4.1 Can FAMOS clients afford the prices charged by the organization?</p>
Short Financial Analysis	<p>2.1.3 Do the organization's staff know what activities and services are needed by FAMOS clients?</p> <p>3.4.2 Are the organization's activities and services financially sustainable, considering the prices charged?</p> <p>5.3 Is the organization's income from FAMOS clients sufficient to cover costs and generate profits?</p> <p>5.4 Is the organization investing a significant amount in order to be able to provide services to FAMOS?</p>
<b>Interviews:</b>	
with key employees and managers	<p>1 Does the organization actually have FAMOS as clients/beneficiaries?</p> <p>2.1.1 Do staff in the organization have awareness of and training in servicing FAMOS clients?</p> <p>2.1.4 Is the organization's expertise in working with FAMOS reflected in its internal (training) materials?</p> <p>2.1.5 Do the organization's staff know how to adapt its activities and services to FAMOS clients?</p> <p>2.2.4 Have FAMOS clients experienced improvements in their businesses resulting from the organization's activities and services (including follow-up evaluation, after-sales service)?</p> <p>2.2.5 Does the organization adapt itself to FAMOS by employing and involving both women and men in its activities and service delivery?</p> <p>3.1 Does the organization know what activities and services are required by both Female And Male Operated Small enterprises?</p> <p>3.3 Are the organization's service packages suitable for FAMOS clients?</p>



Methods to use	Question to ask
	3.4.1 Can FAMOS clients afford the prices charged by the organization?
	3.4.2 Are the organization's activities and services financially sustainable, considering the prices charged?
	4.1 Is communication with FAMOS clients friendly?
	4.4 Do FAMOS services have sufficient status and importance within the organization? – and is this reflected at the strategic level?
	4.5 Are the organization's staff motivated to work with FAMOS clients?
	5.1 Is the equipment used by the organization appropriate for working with FAMOS?
	5.2 Is sufficient time allocated for working with FAMOS clients?
	5.3 Is the organization's income from FAMOS clients sufficient to cover costs and generate profits?
	6 Do the organization's strategies, plans and objectives highlight its work for FAMOS?
with key FAMOS clients (client groups)	2.2.1 Are the organization's methods of delivering support services appropriate for FAMOS clients?
	2.2.2 Is the organization's expertise in working with FAMOS reflected in the materials it hands out to FAMOS clients?
	3.4.1 Can FAMOS clients afford the prices charged by the organization?
	3.4.2 Are the organization's activities and services financially sustainable, considering the prices charged?
	4.1 Is communication with FAMOS clients friendly?
	4.2 Is simple language used in the organization's documents and training materials? — and is it inclusive of both women and men?
	4.3 Are the organization's procedures simple?
	4.6 Is the organization accessible for FAMOS?

ISBN 978-92-2-119707-2



9 789221 197072