2. Mainstreaming gender in HIV and AIDS work

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First edition March 2004

This publication was supported through a partnership with the Canadian Public Health Association and the financial support of the Government of Canada through the Canadian International Development Agency

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Copies of this publication may be obtained from:

SAT
3 Luck Street
PO Box 390 Kopje
Harare, Zimbabwe
Tel: 263 4 781123
Fax: 263 4 752609
Email: info@satregional.org

Download this document from: www.satregional.org

Acknowledgements

The development of this training manual was made possible by the efforts and ideas of many individuals and partner organisations. The primary authors were Mary Rusimbi and Beatrice Hezekiel of the Tanzania Gender Networking Programme (TGNP). Caroline Patsika of Musasa Project and Unity Chari, a gender and development consultant, assisted in developing Part 2 of the manual.

In designing and writing the training material, the authors drew on their own experiences of attending and facilitating training workshops. They also drew on materials developed by their own and other organisations. These included: TGNP’s Training of Trainers Manual and Training of Trainers Manual on Gender for Development Actors; SADC’s Gender Resource Kit for Decision-Makers: Facilitators Guide; TGNP/SAT/RATN’s Gender Policy and HIV/AIDS in the SADC Region; SAT’s Mainstreaming Gender in Response to AIDS in Southern Africa – which was largely based on workshops held by the Women and AIDS Support Network (WASN); the Collaborative Centre for Gender and Development’s Gender Training of Trainers: An Introduction; and the course run by the Overseas Development Group at the School of Development Studies, University of East Anglia, on Gender Mainstreaming: Practical Skills and Critical Analysis.

Many of the materials and activities featured in this manual were developed and tested at a regional training workshop on gender mainstreaming that took place in Tanzania.

SAT finalised the manual, which included a review by Penny Plowman, a gender specialist based in South Africa, and editing by Sarah Middleton-Lee, a writer and an HIV and AIDS consultant.

SAT is grateful to all of these individuals and organisations, particularly TGNP, for their contributions, commitment and support during the development of this manual.
SAT is a regional initiative that supports community responses to HIV and AIDS through in-depth partnerships with community groups in Malawi, Mozambique, Tanzania, Zambia and Zimbabwe, and wider networking, skills exchange and lesson sharing throughout the region and internationally. SAT funding and skills-building activities support the capacity development of partners and their programming in areas such as: Prevention; Care and support; PLWHA support groups and networks; Impact; Information exchange and networking; Advocacy linking issues of HIV and AIDS, gender and human/child rights.

Our overall goal is to build the competence of communities to develop and manage effective, appropriate and sustainable responses to HIV and AIDS.

SAT was established in 1990 as a project of the Canadian International Development Agency, implemented by the Canadian Public Health Association. In 2003, SAT became an independent regional Trust funded by multiple donors.

TGNP is an NGO that seeks to facilitate gender equality and equity, women’s empowerment and the transformation of power relations at all levels of Tanzanian society. It does this by: building organisational capacity; providing training in gender analysis, animation and planning; carrying out outreach and networking; generating and disseminating information; and lobbying and advocacy. It has a core group of members and associates who are experts in gender analysis and animation and who share a common vision and set of objectives. Participation in activities is open to all individuals and organisations that are part of TGNP’s network, including those involved in district-level Intermediary Gender Networks.

TGNP has a strategic partnership with SAT under which it is committed to strengthening the skills and capacity of NGOs and CBOs in mainstreaming gender into their programmes and organisations.
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Introduction

Background

It is widely recognised that gender-based inequalities play a key role in restricting women’s ability to protect themselves from HIV. Most men, however poor they are, can choose when and with whom they have sex and what methods, if any, they use to protect themselves. Men are far more likely to start and control sexual interactions and reproductive decision-making than women. This restricts women’s ability to adopt behaviour that reduces their risk of infection.

Women also carry a heavy and growing burden of HIV and AIDS-related care and support, often due to culturally-defined, unequal gender roles.

Addressing these inequalities is vital for combating the HIV and AIDS epidemic. Gender mainstreaming is an organisational approach that puts gender issues at the centre of organisational processes and programmes. It involves building gender analysis into existing staffing, systems, structures, policies and programmes, and ensuring the equal participation by and benefit of women and men from organisational programmes, processes and resources. If successful, it can contribute to empowering women to take control of their lives and to help men understand and take action on the issues involved.

In practice, however, many mainstreaming efforts by NGOs and CBOs have had little success, often due to the lack of staff with the necessary skills and lack of political will.

In 2001, in response to this situation, SAT collaborated with its partner organisations and the Women and AIDS Support Network (WASN) to produce a publication on Mainstreaming Gender in the Response to AIDS in Southern Africa. This provided ASOs, NGOs and CBOs with basic information about the importance of making their HIV and AIDS programmes more responsive to gender issues. However, it did not tell them how to use the information in a practical way. Clearly, facilitators needed a resource to guide them in training organisations to mainstream gender in a practical way in their organisations. SAT contracted one of its partners, TGNP, to produce this manual.

Aim

This manual aims to build knowledge and practical skills among facilitators who train representatives of southern African ASOs, NGOs and CBOs that want to mainstream gender in their HIV and AIDS organisations, policies and programmes.

Audience

The audience for this manual is female and male facilitators who provide training for ASOs, NGOs and CBOs in southern Africa. This includes facilitators from SAT’s partner organisations in Malawi, Mozambique, Tanzania, Zambia and Zimbabwe in particular.

The facilitators do not have to be experts in gender mainstreaming. They do need, however, to have basic skills in participatory training and basic knowledge about gender equality and community-level HIV and AIDS work.
Structure of this Manual

This manual is divided into five Parts:

Part 1: Key gender concepts
Part 2: Introduction to gender mainstreaming and gender analysis
Part 3: Mainstreaming gender in HIV and AIDS organisations
Part 4: Mainstreaming gender in HIV and AIDS programmes
Part 5: Mainstreaming gender in HIV and AIDS policies.

The introduction to each Part outlines its:

- **Aims:** what it is designed to achieve
- **Contents:** what it consists of
- **Time:** how long it will take to carry out the activities
- **What to do in advance:** what the facilitators need to prepare beforehand
- **Reference materials:** what the facilitators could read to help them prepare.

Each Part is divided into Activities, each of which has an:

- **Aim:** what it is designed to achieve
- **Instructions:** what the facilitators need to do to carry out this Activity.

Some of the Activities also include Facilitators' notes. These feature:

- **Presentation notes:** guidelines for making a presentation about the subject
- **Case studies/examples:** illustrations of what the subject means in practice
- **Helpful hints:** advice for facilitators to help Activities run smoothly.

Throughout the manual, there is information about Handouts – information sheets that facilitators need to prepare in advance. Some facilitators might want to give out all the handouts before the workshop starts, so that the participants have the maximum amount of time to read them. Others might want to give them out, one by one, before the relevant Part or Activity.
How to use this manual

This manual is designed to be flexible, so it can be used in different ways. The Parts can be used all together and in order, for example during a five-day training workshop. They can also be used individually or a few at a time. For example, one Part could be used in a one-off training activity to meet an organisation’s specific needs, or several different Parts could be used in a sequence of training activities over weeks or months.

To help you plan your training activities, each Part includes an estimate of how much time you will need to complete it.

Helpful hint!

This manual uses the general term ‘workshop’ to describe a training activity that could be anything from a one-hour session to a five-day course.

Materials needed

All of the Activities in this manual can be carried out using a few simple resources. These are:

- Flipcharts or large sheets of blank paper
- Pieces of card, preferably of different colours and sizes
- Marker pens, preferably of different colours
- Sticky tape, blu-tack or Stiki-stuf.

Facilitation

As noted, facilitators using this manual are expected to have basic skills in participatory training. This includes the ability to facilitate large and small group work, summarise key points and involve all participants. It also includes the ability to use participatory activities, such as role-plays, and to keep learning interesting and enjoyable.

This manual instructs facilitators step by step on how to carry out its Activities. Facilitators should also refer to the SAT Training and Practice Manual 1: How to plan and run a participatory workshop to remind them of good practice ways to plan, begin and facilitate a participatory workshop.

Facilitators should also involve their own creativity and common sense in using this manual. For example, if one of the case studies does not suit your local culture, then please develop one that does. Alternatively, if your participants seem tired and bored, then please use an energiser to liven them up!
Adapting this manual

This manual is based on the experiences of organisations in southern Africa and features examples and case studies from the region. Nevertheless, facilitators in other parts of the world can use the information and activities if they adapt them to the local culture and context.

Similarly, this manual is based on the experiences of organisations working on HIV and AIDS. If adapted, the information and activities could be used by facilitators working in other fields of community development.
Part 1: Key gender concepts

Aims:
To enable participants to:

- Develop an understanding of gender as a concept
- Develop an understanding of the key concepts in gender mainstreaming
- Learn how to apply the key concepts to their development work, particularly in relation to HIV and AIDS.

Contents:
This Part consists of:

- Activity 1: What is gender and sexuality and why does it matter?
- Activity 2: Key gender concepts
- Activity 3: Internalising key gender concepts and linking them to HIV and AIDS work
- Activity 4: Clarifying the difference between sex and gender
- Activity 5: Exploring gender stereotypes
- Activity 6: How women and men behave.

Time:
This Part requires approximately 4 hours.
**What to do in advance:**

- Prepare *Handout 1: Concepts of Gender and Sexuality/The Gender Dimensions of AIDS in Southern Africa*, based on pages 3-7 of SAT’s *Mainstreaming Gender in Response to AIDS in Southern Africa*. Make a copy for each participant to read before the activity. (To be used in Activity 1.)

- Write the titles of key gender concepts (see Activity 2 for a list) on small cards and put them into a container, such as a plastic bag or a small box. (To be used in Activity 2.)

- Prepare *Handout 2: Key Concepts Related to Gender and HIV and AIDS*, based on pages 47-51 of SAT’s *Mainstreaming Gender in Response to AIDS in Southern Africa*. Make a copy for each participant. (To be used in Activity 2)

- Write examples of policy issues relating to sex and gender on a flipchart. (To be used in Activity 3.)

- Before the workshop, ask participants to collect examples of gender stereotyping from their community. These might be from newspaper articles, music tapes, videos of films, advertisements from magazines, or in notes about things that people have said. (To be used in Activity 4.)

**Reference materials:**

Activity 1: What are gender and sexuality and why do they matter?

Aim:

To enable the participants to develop an understanding of what gender and sexuality mean and why they matter, particularly in relation to HIV and AIDS work.

Instructions:

1. Explain the aims of the Part.
2. Explain the aim of the Activity.
3. Check that the participants have read Handout 1: Concepts of Gender and Sexuality/The Gender Dimensions of AIDS in Southern Africa.
4. Make a brief presentation about what gender and sexuality mean (see facilitators’ notes).
5. Facilitate a discussion about why it is important to address gender and sexuality in relation to work in HIV and AIDS.
6. Summarise the key points arising from the Activity. Highlight the following facts:
   - Understanding concepts about gender can help women and men think about the issues and take action
   - Internalising gender concepts helps people understand the issues. It helps us analyse the ‘real life’ experiences of women and men at different levels, including individual, household, organisational, community and national
   - Internalising gender concepts also helps us understand social inequality and the differences between people, not just in relation to sex, but also ethnicity, wealth, age, etc.
   - De-mystifying gender concepts enables people working in development to make informed decisions and to develop appropriate policies and programmes, including those that relate to HIV and AIDS.
Facilitators’ notes: Presentation notes on concepts of gender and sexuality

- Gender refers to widely-shared expectations and norms within a society about male and female behaviour, characteristics and roles. It is a social and cultural construct that differentiates women from men and defines the ways in which women and men interact with each other. Gender is a culturally ascribed set of characteristics that defines what it is to be a man or a woman in a given cultural context at a given time. It defines what women and men do, how they behave, how they are perceived and how they relate to each other.

- Gender is a culture-specific construct. There are significant differences in what women and men can or cannot do in one society when compared to another. In all cultures, however, the roles of men and of women are distinct, as is their access to productive resources and their authority to make decisions. Typically, men are responsible for the productive activities outside the home, while the domain of women concerns the reproductive and productive activities within the home. In most societies, women have limited access to income, land, credit and education, and limited control over these resources.

- Gender varies within and across cultures, race and ethnicity. It changes over time and other social dynamics influence it, such as age and class.

- Gender roles and behaviour are learned through socialization.

- Sex, on the other hand, is fixed, permanent and universal.

- Sexuality is distinct from gender, yet is intimately linked to it. It is the social expression of a biological drive. An individual’s sexuality is defined by whom one has sex with, in what ways, why and under what circumstances.

- Sexuality is more than sexual behaviour. It is a multidimensional and dynamic concept. An individual’s sexuality is influenced by explicit and implicit rules imposed by society. These vary according to gender, age, economic status, ethnicity, religion and education.

- Power is fundamental to both sexuality and gender. The power underlying any sexual interaction, heterosexual or homosexual, determines how sexuality is expressed and experienced. Power determines whose pleasure is given priority and when, how and with whom sex takes place.

- The power balance in gender relations is unequal in that it favours men. This translates into an unequal balance of power in heterosexual interactions. Male pleasure has priority over female
pleasure, and men have greater control over when and how sex takes place than women. An understanding of male and female sexual behaviour requires an awareness of how gender and sexuality are constructed through a complex interplay of social, cultural and economic forces that affect the distribution of power.

- These concepts are important in the discussion of HIV and AIDS. Most HIV infections are transmitted through sexual intercourse, and heterosexual intercourse accounts for the largest proportion. Gender and sexuality are, therefore, significant factors in determining the spread of HIV. They also influence availability, access and quality of treatment, care and support. In any analysis of the HIV and AIDS situation in southern Africa, it is crucial to consider gender issues.
Activity 2: Key gender concepts

Aim:

To enable the participants to develop an understanding about the key concepts involved in gender work, especially in relation to HIV and AIDS.

Instructions:

1. Explain the aim of the Activity.
2. Check that participants have read Handout 2: Key Concepts Related to Gender and HIV and AIDS.
3. Make a presentation about key gender concepts (see facilitators’ notes).
4. Ask the participants:
   - If any of the information is unclear
   - Which concepts they are familiar with and which are new.
5. Facilitate a discussion about which concepts are most relevant to work on HIV and AIDS.
6. Summarise the key points arising from the Activity.

Helpful hint!

Rather than making one long presentation about gender concepts, stop occasionally and use buzz groups. For instance, ask each participant to turn to the person next to him or her and spend 2-3 minutes discussing the concept that has been described.
Facilitators’ notes: Presentation notes on key gender concepts

- **Empowerment** is the process by which people take control to overcome obstacles. Female empowerment is women taking action to understand, identify and overcome gender discrimination in order to achieve gender equality.

- **Gender** is defined as the set of characteristics, roles and behaviour patterns that socially and culturally distinguish women from men. Gender characteristics change over time and differ from one culture to another. The concept of gender refers to the roles and characteristics of women and men and to the relations of power between them.

- **Gender discrimination** means that individuals are treated differently on the basis of their sex. In many societies, this is maintained by structural discrimination against women in the distribution of income, access to resources and participation in decision-making.

- **Gender division of labour** describes a pattern in which society assigns women one set of roles and men another set, based on gender. This is generally associated with a grossly unequal distribution of reward. For instance, many societies expect women to perform most of the unpaid domestic work and subsistence food production, whereas men are dominant in cash crop production and wage employment.

- **Gender equality** means that there is no discrimination on the basis of a person’s sex in the allocation of resources and in the access to services. Gender equality denotes equal value of women and men despite their differences and the existence of equal conditions and opportunities to access and control resources, processes and benefits by men and women. Gender equality may thus be measured in terms of equality of opportunity or equality of results.

- **Gender equity** means fairness and justice in the distribution of benefits and responsibilities. A gender equity approach ensures that women have a fair share of the benefits and responsibilities in society, as well as equal treatment before the law, equal access to social services, including education, and equal pay for work of equal value.

- **Gender gap** is a measure of gender inequality. It is a useful social development indicator. For example, we can measure the gender gap between boys and girls in terms of the educational levels achieved.
• **Gender roles** are socially-defined roles for women and men. For example, most cultures define child-rearing as a female role, although there is no biological reason why men cannot do it. Definitions of gender roles change over time and differ between cultures.

• **Gender sensitivity** is the ability to recognise gender issues, especially the ability to recognise women’s distinct perceptions and interests arising from their gender role. Gender sensitivity is the beginning of gender awareness, which is more analytical and more questioning of gender disparities.

• **Gender stereotyping** occurs when men or women are persistently attributed certain characteristics or roles, thereby creating the belief that these are invariably linked to gender. For instance, the perceptions that all women are weak and caring and that all men are strong and able to make important decisions are gender stereotypes that are frequently encountered. Gender stereotyping reinforces gender inequality by portraying assumptions and conditions that maintain the inequality as biologically or culturally fixed.

• **Oppression** is the use of political power to maintain an unjust system. Oppression may exist at state, village, or household level. Women’s oppression refers to male domination used to subordinate of women.

• **Patriarchy** is the male domination of ownership and of the control of resources that maintain gender discrimination. Patriarchy is maintained by an assertion of male superiority that claims to be based on biological differences between women and men, on cultural values, or on religious doctrines.

• **Practical gender needs** are those needs of women and men that can be met without challenging gender inequalities. They relate to the areas in which women or men have primary responsibilities and include the need for access to health care, water and sanitation, education for children, etc.

• **Reproductive health** is the state of physical, mental and social well-being in all matters relating to reproduction and to the reproductive system. It includes a satisfying and safe sex life, the ability to have children and the freedom to decide if, when and how often to do so. It also includes the right of women and men to be informed and to make choices about their sexuality, to decide when and with whom to have sex, and to have access to effective methods of protection against HIV infection and pregnancy. Reproductive health care includes services for family planning, treatment of infertility, obstetrics and the prevention and treatment of reproductive tract infections.
• **Reproductive rights** are the basic rights of women and men to decide freely and responsibly on issues of sexuality and family planning, to have access to information to make these decisions and the means to carry them out. Reproductive rights include the right to attain the highest standard of sexual and reproductive health and the right to decide on issues of reproduction free of discrimination, coercion and violence

• **Sex** refers to the biological/physiological differences between women and men that are universal and fixed

• **Sex roles** are defined by biological differences between men and women. For instance, pregnancy and child-bearing are female sex roles that men cannot assume

• **Sexual health** represents an aspect of health that is somewhat more inclusive than reproductive health. It includes the enhancement of personal relations, respect for the security of the person and the physical integrity of the human body as expressed in human right documents, and the right to make decisions concerning sexuality and reproduction free of discrimination, coercion and violence

• **Sexual rights** include the human rights of women and men to have control over and decide freely and responsibly on matters related to their sexuality

• **Strategic gender needs** are defined based on an understanding and analysis of women’s subordinate position in society. Addressing strategic needs requires actions to bring about structural social changes. Strategic needs may include the need for constitutional equality of women, reproductive rights, a political voice, or the protection of women from violence

• **Structural gender inequality** exists where public or social institutions practice gender discrimination. Structural gender inequality is more entrenched if it is maintained by administrative rules and laws, rather than by custom and tradition

• **Transformatory potential** is an analytical concept to grade interventions according to their ability to transform lives. To assess the transformatory potential of a programme, the following questions should be asked: What needs to be added to the programme to ensure that it contributes to such a transformation? Will the programme increase the social status of the beneficiaries? Will it enhance their economic or personal empowerment? Will it increase their decision-making capacity?
Activity 3: Internalising key gender concepts and linking them to HIV and AIDS work

Aim:
To enable the participants to internalise key concepts about gender and to understand how they relate to work on HIV and AIDS.

Instructions:
1. Explain the aim of the Activity.
2. Ask the participants to sit on chairs in a circle. Place a container with cards with key gender concepts written on them on the floor in the middle of the circle.
3. Ask a participant to pick out a card, read out the concept and explain what he or she thinks it means.
4. Facilitate a discussion about the concept by:
   • Asking the other participants what they think about it
   • Giving practical examples of what it might mean in practice in relation to HIV and AIDS work.
5. Ask another participant to pick out a card. Repeat the process until the participants have discussed all the cards.

N.B. The next three activities complement this one by going into more depth about the issues involved. In practice, you might want to use only one or two of them, depending on participants’ needs and the time available.

Helpful hint!
The atmosphere for this Activity needs to be fun and not like a school exam! It aims to encourage participants to share and develop their understanding about gender concepts, rather than to develop word-perfect definitions of them.
Participants can take turns to define gender concepts
Activity 4: Clarifying the difference between sex and gender

Aim:
To enable the participants to clarify the difference between sex and gender by exploring how they apply to policy issues.

Instructions:
1. Explain the aim of the Activity.
2. Put up a flipchart of some examples of policy issues relating to sex and gender (see facilitators’ notes). Read them to the participants.
3. Divide the participants into small groups. Ask each group to discuss to what extent the policy issues are about sex and to what extent they are about gender.
4. Bring everybody back together. Ask each small group to present its conclusions.
5. Summarise the key points arising from the Activity. Highlight the following facts:
   • Some policy issues are about sex (i.e. biology), some are about gender (i.e. social issues) and others are about both
   • Traditionally, women have been excluded from some occupations, such as mining and defence, because they have been perceived to be physically weaker than men. In reality, however, there is no reason why women cannot be involved, especially as technology is reducing the manual burden of these occupations
   • Because of biological differences, girls and women require different kinds of sanitary facilities than do boys and men. The lack of appropriate facilities has a major affect on girls and their studies, as well as on their sense of dignity. It is an example of insensitive planning by school authorities and architects who, on the whole, are men
   • That society does not hold young men responsible for impregnating girls is a gender issue. Simply because they do not carry and give birth to the child, society releases them from the responsibility of parenthood
   • Family planning projects that only target women fail to acknowledge women and men’s joint responsibility for parenting, in terms of conceiving children and caring for them.
Facilitators’ notes: Examples of policy issues relating to sex and/or gender

- Most southern African countries ban women from boxing, serving in combat roles in the military and carrying out mining activities
- Research has found that mathematics and science teachers are far more responsive to male students, encouraging them to speak up and offering them more positive feedback than girls
- Research has shown that many teenage girls miss several days of study each year because schools do not provide adequate sanitary facilities
- Young girls who become pregnant usually are forced to leave school. Meanwhile, the young men who impregnate them are able to complete their studies
- Family planning programmes tend to target women rather than men
- Women own only a tiny proportion of the land in southern Africa
- Few work places in southern Africa make provision for paternity leave
- Although women played an active role in the liberation struggles of many southern African countries, they went back to domestic roles afterwards.
Activity 5: Exploring gender stereotypes

Aim:
To enable the participants to learn about gender stereotypes and what they mean in practice.

Instructions:

1. Explain the aim of the Activity.
2. Make a brief presentation about the definition of a gender stereotype and provide an example of what it means in practice (see facilitators’ notes).
3. Divide the participants into small groups. Ask the members of the groups to share the ‘real life’ examples of gender stereotypes they have brought with them (for example, newspaper articles or magazine advertisements).
4. Ask each group to use these examples, and any others they think of, to identify a gender stereotype in the form of:
   - Language (e.g. a local proverb or saying)
   - Music (e.g. a few lines from a well-known song)
   - Popular culture (e.g. a scene from a soap opera on the television)
   - Religion (e.g. a line from the Bible or the Koran)
   - Education (e.g. an anecdote from someone’s experiences at school)
   - Media (e.g. a clipping from a newspaper)
   - Advertising (e.g. an advertisement from a magazine).
5. Bring everybody back together. Ask each small group to present its conclusions.
6. Use a chart to categorise the examples of gender stereotyping in terms of what they say about women and what they say about men (see facilitators’ notes).
7. Facilitate a discussion about what the chart shows. Ask participants to identify:
   
   • The dominant images of women and men communicated to us through everyday language, media, etc.
   
   • The impact these images have on us and our society
   
   • How such gender stereotypes can be changed.

8. Summarise the key points arising from the Activity. Highlight the following facts:

   • There are practical ways to challenge gender stereotypes. For example, you can write letters to newspapers, refuse to buy certain music, or encourage authors to include positive role models in their novels
   
   • In Botswana, for example, every time a negative statement is made about women in parliament, Emang Basadi, an NGO that works on gender and leadership, issues a statement entitled ‘What they say about us’. In South Africa, Media Watch monitors news coverage and campaigns against sexist jokes and advertising.

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**Facilitators’ notes: Definition and example of gender stereotyping**

The **definition** of a gender stereotype is:

A belief about women and men that is socially constructed through sayings, songs, proverbs, the media, religion, customs, culture, education and drama, etc.

An **example** of a gender stereotype is:

A woman from a southern Africa country went to a conference in London. A British driver was supposed to meet her at the airport. They missed each other in the arrivals hall and he went away. The woman phoned the conference organisers who phoned the driver on his cell phone. He returned to the airport to look for the participant, but they still missed each other. Eventually the woman took a taxi. When the two people finally met, the driver said, “When I heard you were a conference participant, I assumed you must be a man!”

An irate workshop participant

“When I heard you were a conference participant, I assumed you must be a man!”
Facilitators’ notes: Chart for categorising examples of gender stereotyping

<table>
<thead>
<tr>
<th>Example of gender stereotyping</th>
<th>Source of example (e.g. language, the media)</th>
<th>What it says about women</th>
<th>What it says about men</th>
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</table>
Activity 6: How women and men behave

Aim:
To enable the participants to explore the different ways in which women and men behave.

Instructions:

Helpful hints!
When selecting actors for these role-plays:
• Choose people who are confident about performing in public
• Make sure they know exactly what issues you want them to communicate
• Encourage them to be enthusiastic, but not get too carried away with their story line!

N.B. Before starting this Activity, you need to select 2-4 women and 2-4 men to prepare and act out role-plays that focus on the different ways women and men involved in decision-making behave towards each other (see facilitators’ notes).

1. Explain the aim of the Activity.
2. Ask your actors to perform their role-plays about how women and men involved in decision-making behave towards each other.
3. Facilitate a discussion about the following:
   • What were there the similarities and differences in how the women and men behaved towards each other?
   • Are women and men judged differently in relation to how they behave towards each other?
   • Are women obliged to support other women and to take up gender causes?
4. Summarise the Activity by filling in a chart to analyse the different ways women and men behave (see facilitators’ notes).

Helpful hint!
During this Activity, the issue of whether woman oppress other women may come up. Emphsise that gender equality is not about women being perfect and ‘right’ and men being imperfect and wrong. Instead, it is about women and men having the choice to be whomever they want and about fighting discrimination by one sex over another.
Facilitators’ notes: Examples of role-plays about how women and men behave

Examples include:

- A female gender activist and a female politician are arguing in public. The activist accuses the politician of failing to deliver on policy changes. The politician accuses the activist of not respecting her. Two other women approach them and urge them not to argue in public because it will lead to all women in powerful positions being seen as bickering and unable to get along.

- A male manager is approached by a male colleague about another manager who is a threat to him. The first manager, a political appointee, is aware that he owes his position to political patronage. His colleague advises him to make sure the other manager is marginalised, never put in a position where he can shine and, if possible, is fired from his job.

Facilitators’ notes: Chart for analysing how women and men behave

<table>
<thead>
<tr>
<th>How women behave …</th>
<th>How men behave …</th>
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Activity 7: Gender, HIV and AIDS

Aim:

- To increase understanding by participants of the relationship between gender and HIV/AIDS
- To help participants understand the gender dimensions of HIV/AIDS.

Instructions:

Divide the participants into small groups (maximum of 5 people). Ask each group to discuss whether women and men are equally affected by HIV/AIDS and to identify the factors that increase the vulnerability of men and women.

1. Explain the aim of the Activity.
2. Put the issues to be discussed on a chart.
3. Divide the participants into groups and allocate them space where they can hold discussions.
4. Ask the groups to appoint one person to chair the discussions and another to report in plenary.
5. Allocate 30 minutes for the discussions.
6. Provide flipchart paper and marker pens so that each group can record key points.
7. During the groups’ discussions, go round each one to ensure that discussions are on track and to provide support in clarifying the questions.
8. In plenary, ask the groups to present their contributions.
9. Open the discussions to review the contributions and add any other suggestions.
10. Summarise the key points arising from the Activity (see facilitator’s notes).
Facilitators’ notes

HIV/AIDS affects men and women differently because of their physiology, social and economic positions.

The gender roles that women and men play in a given society also have implications for their vulnerability to HIV/AIDS.

For example:

- Women, especially young women and girls, are 2-4 times more susceptible to HIV infection because they have a larger exposed mucosal area and, in young girls, an immature mucosal surface that is more liable to tearing. In addition, semen has a high concentration of HIV and stays in the vagina for a long time.
- Girls in the 15-19 age group in sub-Saharan Africa are 5-6 times more likely to be affected than boys of the same age.
- Society keeps girls and women ignorant of sexual matters and they are therefore unable to protect themselves.
- Gender violence, which is prevalent in our societies, increases the risks to women and girls.
- Myths about sleeping with virgins as a cure for HIV/AIDS expose female children to HIV infection.
- Cultures that subordinate women to men increase women’s vulnerability as these women do not have control over their sexuality, do not make decisions on when and how to have sex and ultimately lack the space to negotiate safe sex.
- For HIV-positive women, childbirth increases the risk of fast progression to AIDS.
- Poverty and the economic dependence of women on men increase risky behaviour by women, e.g. prostitution.
- Culture and customary practices, e.g. wife inheritance, some funeral rites that require the widow to sleep with a male in-law, polygamy and arranged marriages, increase women’s vulnerability to HIV infection.
- Increased poverty and lack of decision-making about economic resources reduces women’s ability to access medical remedies.

Examples of the different effects of HIV/AIDS on women and men include the following:

- Men and women play different roles in the care and support of the sick. HIV/AIDS increases the burden on women as they become carers of sick family members. Women may quit their jobs and female children may drop out of school. Without the appropriate protective materials, they also risk infection from handling the body fluids of the sick.
Marital families may also reject women when they get sick and send them back to their natal homes.

The death of the husband may impoverish the surviving wife, who may be dispossessed of her assets, chased away from her marital home, or blamed for her husband’s death.

Poor access to and control over productive resources means that women are seldom in a position to lessen the impact of HIV/AIDS, and this increases their poverty.

**Status of gender mainstreaming in HIV/AIDS:**

- To date, HIV/AIDS strategies have largely been ineffective because they have failed to take into account the social, economic and power relations between the special needs of men and women.

- Development practitioners must understand the gendered nature of the epidemic so they can address gender issues in HIV/AIDS and ultimately improve targeting and responsiveness in their development initiatives.

- Many HIV/AIDS organisations and development agencies have focused on outreach activities with communities but have not looked at their own organisations when assessing the impact of HIV/AIDS.

- Organisations must address HIV/AIDS issues at both organisational and programme level. Gender analysis of the variable impact of HIV/AIDS should be at the centre of the strategies adopted at both levels.

*Violence against women can increase a woman’s vulnerability to HIV and AIDS*
Part 2: Introduction to gender mainstreaming and gender analysis

Aims:

To enable the participants to:

- Understand the concept and process of gender mainstreaming
- Understand the concept and purpose of gender analysis
- Identify at least two levels at which gender analysis should be done
- Understand at least six gender analytical tools
- Apply at least four gender analytical tools and assess their appropriateness for use in HIV/AIDS work
- Select tools for the analysis of their organisation’s policies and/or programmes.

Contents:

This Part contains:

- **Activity 8:** Defining gender mainstreaming
- **Activity 9:** Explaining gender analysis
- **Activity 10:** Tools for gender analysis
- **Activity 11:** Applying gender analysis tools
- **Activity 12:** Selection and application of tools for the analysis of organisational policies and programmes.

Time:

This Part requires approximately 8 hours.
What to do in advance:

- Read about gender analysis frameworks and tools from available sources (see reference materials)
- Prepare Handout 3: Tools for gender analysis (based on Annex 1). Make a copy for each participant (To be used in Activity 10.)
- Prepare Handout 4: Checklist for gender analysis of project cycle (based on Annex 2). Make a copy for each participant (To be used in Activity 12.)
- Prepare Handout 5: Situation analysis and project identification (based on Annex 3). Make a copy for each participant (To be used in Activity 12.)
- Ask participants to bring their project and policy documents to the training. (To be used in Activity 12.)

Reference materials:

Activity 8: Defining gender mainstreaming

Aim:
To enable the participants to define gender mainstreaming and to understand what it involves.

Instructions:
1. Explain the aim of the Part.
2. Explain the aim of the Activity.
3. Ask the participants what they think gender mainstreaming means. Discuss and explain the concept (see facilitators’ notes).
4. Ask the participants what they think the differences are between gender mainstreaming and integrating gender into existing programmes.
5. Suggest a definition of the term (see facilitators’ notes).
6. Make a presentation about the key issues to consider in relation to gender mainstreaming (see facilitators’ notes).
7. Suggest levels of gender mainstreaming in HIV/AIDS work (organisational – policy, values, structures and culture, processes, skills etc. –, programme – various stages of the programme/project cycle).
8. Ask participants for feedback on what you have presented. Encourage them to share their own thoughts and experiences about gender mainstreaming.
9. Summarise the key points arising from the Activity.
Facilitators’ notes: Definition of gender mainstreaming

Gender mainstreaming:

• Systematically ensures that gender considerations are placed at the centre of policies, programmes, processes and activities

• Integrates gender concerns in the analysis, formulation and monitoring of policies, programmes and projects, and the systems that support them, in order to promote gender equality and the empowerment of women in development activities

• Emphasises interrelationships between theories and ideas about development and the organisations and people making key decisions, recognising that the ideas and practices in the mainstream determine who gets what and provide a rationale for the allocation of societal resources and opportunities

• Involves more than having equal numbers of men and women in current structures and activities; it involves changing institutions, policies, programmes, projects and processes so that they promote gender equality.

The purpose of gender mainstreaming:

• Promotes gender equality as a fundamental value that is reflected in development programmes and institutional practices

• Redresses the disadvantaged position of women in relation to men.

The differences between gender mainstreaming and integration of gender into existing programmes:

• Gender mainstreaming addresses interrelationships between promoting changes in organisations’ programmes and changes in organisational systems and practices necessary to achieve gender sensitivity in organisations and thus effective programme changes

• Gender mainstreaming involves restructuring policies, programmes and activities to ensure that they address the needs of women and men and create conditions for equal participation by and benefit of both men and women

• The integration of gender into existing programmes involves merging gender into an existing set of systems with little attention paid to the dynamics of the systems involved. It means putting gender as an add-on (an afterthought) to the policies/programmes, which usually results in gender issues being ignored or marginalised during implementation.

(GPD Training manual, Session 17.)
Facilitators’ notes: Gender mainstreaming

Gender mainstreaming means more than identifying the impact of policies, programmes or projects on women. While a focus on impact is necessary and important, mainstreaming (or engendering) has other important aspects.

The principle of gender and development recognises that women and men have different experiences and interests by virtue of their different roles and responsibilities and the relationship between them. It acknowledges that women are generally disadvantaged by virtue of their lower social status and limited access to resources and opportunities for their own development. The way men and women share power and resources is implicitly or explicitly prescribed by the gender structure of the community and its organisations. For instance, a complex set of power relations defines the division of labour and its associated norms, values and ideologies related to masculinity and femininity.

These relations tend to give women less political voice, less economic, social and cultural value, less access to resources and less control over the use of these resources. Gender-specific power relationships vary across societies and across time.

The rationale for gender mainstreaming in the work of AIDS Service Organisations:

• Gender mainstreaming is based on the recognition that organisations implementing policies and programmes in response to HIV and AIDS as well as the communities where these programmes and policies are being implemented are themselves gendered structures.

• In most ASOs, men predominate in positions of power and decision-making, while generally women have nurturing roles (home-based care, orphan care, voluntary activities as counsellors or trainers, etc.).

• Gender mainstreaming in HIV and AIDS programming requires an understanding and response to:
  - Institutional issues related to gender
  - Myths about male and female sexuality
  - Control over sexual relations within and outside the marriage
  - Violence against women and girls
  - Issues of blame and rejection based on gender
  - Gender differences in the need for information and access to information
  - Issues of communication between men and women
- Gender-related legal and human rights issues
- The unequal distribution of power between men and women
- Gender-related marginalisation and stigma.

To mainstream gender issues in HIV and AIDS programmes, ASOs, NGOs and CBOs have to know about the gender-related power relationships in their community. They also need to understand how their own work, organisational structures and policies reflect these relationships. The interaction between a community and an organisation should be analysed in relation to each specific programme area, e.g. peer education and peer action programmes, IEC programmes, counselling, home-based care and support, research, advocacy and monitoring and evaluation. The analysis should focus on:

- The gender implications of current and future HIV and AIDS policies
- The differential impact of HIV and AIDS programme strategies on women and men by age group
- The affect of HIV and AIDS policies and programmes on different social groups of women and men.

Levels of gender mainstreaming:

• Organisational
  - Policies (including vision and mission)
  - Structure
  - Culture and values
  - Systems and procedures
  - Human resources
  - Programmes/projects
  - Goals
  - Strategies
  - Objectives
  - Inputs (including financial resources)
  - Activities
  - Stakeholders
- Results
- Programme/project implementation
- Monitoring
- Reporting
- Evaluation.

Stages in gender mainstreaming:

- **Gender audit/situational analysis.** This will enable an organisation to determine the relevance and responsiveness of its policies, structures, programmes and processes to the needs and interests of men and women in relation to HIV/AIDS, and to identify gaps and entry points for gender mainstreaming and capacity building. An audit will also help the organisation examine its strengths, weaknesses, threats and opportunities in relation to the prevailing context/environment.

- **Gender analysis (organisational and programme).** This will examine the extent to which the organisation and its programmes have mainstreamed gender. Critical areas at organisational level include organisational policies, values, culture, structures, management systems and human resources. Critical areas at programme level include stakeholder identification, programme identification, development, design, implementation, monitoring, evaluation and reporting. Checklists assist in collecting appropriate information.

- **Gender policy and strategy development.** A gender policy will indicate the organisation’s commitment to promoting gender equality and to removing barriers to women and men’s participation, contribution and benefit. Gender strategies will outline how the organisation will translate policy into concrete benefits for men and women, i.e. what specific measures will be taken.

- **Mainstreaming at organisational and programme levels.** This will involve systematically restructuring organisational- and programme-level issues to ensure that they respond to the needs and interests of women and that they promote equal participation, control over and benefit by men and women from organisational and programme resources and opportunities. Checklists will facilitate the mainstreaming process.
Activity 9: Explaining gender analysis

Aim:
To enable the participants to understand the concept and purposes of gender analysis.

Instructions:
1. Explain the aim of the Activity.
2. Introduce the session by referring to the steps in gender mainstreaming, beginning with the first one: gender analysis.
3. Distribute the case study. Ask participants to read it individually and to answer the questions at the end. (Alternatively, the trainer can develop a case study based on his/her knowledge of gender issues within the sector and/or region of the workshop participants.)
4. Ask participants to form groups of three to discuss their analysis of the case study. Lead a large group discussion of the gender issues identified in the case study.
5. Ask the participants what gender analysis means. Why do a gender analysis? What purpose does it serve? Suggest a definition to the participants (see facilitators’ notes).
6. Ask participants how they would decide what to include in a gender analysis. Explain how the participants should go about the activity by referring to the points given in the facilitators’ notes.
7. As a way of summing up, explain to participants that various frameworks and tools enable development workers, programmers and policy-makers to identify, interpret and measure gender issues.
Case Study

For the last seven years, Government, through the Ministry of Health and Child Welfare has been implementing an HIV/AIDS awareness programme in Chitoro, a community of approximately 10,000 inhabitants in the eastern part of the country. The programmes have mainly provided information on the epidemiology of HIV/AIDS and distributed condoms. Several development NGOs have complemented Government’s efforts, as have community-based Aids Service Organisations, who have focused on awareness provision of psychosocial support and funds for income-generating projects. 80% of the population is made up of women and children, and one-third of the households are female-headed. Increasingly, child-headed households are becoming a visible feature of the community. Many of the men are either dead or working in urban areas or the nearby mine. Working husbands come home during holidays and sometimes on weekends.

The community survives from agro-based economic activities. However, due to recent droughts and the high cost of inputs, the community’s productive output has diminished, leaving many families dependent on food aid from donor organisations. The economic downturn has made it virtually impossible for working men to send money home to support their families. Instead, men are increasingly depending on rural areas to subsidise their incomes, which leaves rural households very poor. To survive, women and girls in the community are increasingly turning to prostitution as a survival strategy. Some are turning to the truckers who drive past their community on their way to Mozambique. Long periods of separation from their wives are also forcing men to set up urban households where they live with other women or engage in high-risk sexual behaviour.

Despite the existence of HIV/AIDS awareness programmes, the prevalence of HIV/AIDS has continued to increase over the years, as evidenced by chronic illnesses and frequent deaths in the community from AIDS-related illnesses. Men who have been working in towns are also coming home to die. Women are spending a lot of their time on care activities or attending funerals and this has affected their productive activities, resulting in reduced food and income security of their households. The death of adults has led to the increase in orphans and child-headed families.

The economic downturn has also affected the availability of health services. The nearby clinic is often without drugs. Even if the drugs were available, many members of the community could not afford them.

Government and NGO awareness programmes have targeted women in the community. NGOs and AIDS organisations have provided support to the infected and affected by organising income-generating projects and psychosocial support groups.
Questions

1. What are the critical gender issues that affect the transmission of HIV/AIDS in this community?

2. What are the differences in the impact of HIV/AIDS on women and men in this community?

3. What are the critical gender issues that affect the effectiveness of current efforts by Government and NGOs?

4. If you were asked to restructure the HIV/AIDS interventions in this community to make them more effective, what would you suggest and why?

Facilitators’ notes: Definition of gender analysis and its purpose

Gender analysis:

Gender analysis is the process of systematically gathering and analysing information on the gender organisation of communities and institutions in order to ascertain who is positioned where, who does what, who has access to what resources and opportunities, who benefits from what resources and opportunities, who needs what resources and opportunities and what factors limit the equal participation and benefit by men and women.

An analytical approach is used to identify, interpret and measure the nature and extent of gender-based differences and inequalities between men and women (e.g. gender roles, division of labour, access to and use of resources, rights, responsibilities, obligations and decision-making) in the context of:

- Culturally-determined social, political and economic organisation (e.g. household, markets, civil society)
- Political, socio-economic and other factors (e.g. education, income, ethnicity, place of residence, age).

Gender analysis is also identifying and analysing the different roles and needs of women and men in order to understanding the implications for the design and implementation of strategies for development (ILO, 1995).
The purpose of gender analysis

Gender analysis helps to create an understanding of problems experienced by disadvantaged people in the community (especially women), the causes of the problems, obstacles to overcoming them and possible solutions. Analysing gender roles and the influences of social, cultural, economic, environmental and political realities in the context of a particular community or group of people contributes to the development of interventions. These interventions might address gender roles, the division of labour, or the needs and participation of men and women within a particular context. It helps us understand the different vulnerability to HIV and AIDS of women and men, and the different capacity of men and women to lessen the effects of HIV/AIDS. In a broader development context, gender analysis helps create understanding of the different capacities of women and men to participate, contribute and benefit from development resources and processes. It also provides baseline data from which to measure change and project effectiveness.

Facilitators’ notes: Elements to include in gender analysis

The elements to include in gender analysis depend on the focus of the gender planning. An organisation needs to consider the following four levels when addressing gender issues:

1. Its own internal structure (to include positions occupied by men and women, and the existence of a specific structure responsible for the promotion of gender equality), organisational culture (whether it creates conditions for equal participation and benefit by women and men) and organisational practices (whether they promote equal participation, and benefit and address the special needs of men and women) that are defined by its organisational values and determine the way in which it interacts with its client population.

2. Organisational policies (whether they acknowledge the principle of gender equality and equity as human rights and development issues; whether they articulate commitment to promote gender equality).

3. Strategies (whether there are guidelines for the promotion of gender equality; whether the principle of affirmative action is adopted as one of the strategies for promoting gender equality).

4. Its programmes/projects and/or services, their objectives and activities and how they are organised to meet the needs of the client population.
Activity 10: Tools for gender analysis

Aim:
To enable participants to build their understanding of at least six gender analytical tools and one gender analysis framework.

Instructions

1. Explain the aim of the Activity.

2. Check that the participants have read Handout 3: Appendix 1: Tools for gender analysis.

3. Ask participants if any of them have done gender analysis or PRA. Ask them to share their experiences.

4. Explain to participants that:
   - Different scholars and institutions have developed different frameworks for gender analysis and planning
   - These frameworks aim to equip development workers with a common understanding and language for analysing gender issues that relate to their everyday work
   - These frameworks vary in that they have different priorities in terms of issues, different sets of beliefs and goals that determine their use and different sets of tools and procedures
   - The frameworks can be divided into two broad categories, i.e. those that focus on analysing gender relations and those that facilitate the conceptualisation of development interventions.

5. Ask participants to give examples they may have heard about. These could include the following:
   - Harvard Framework
   - Development Planning Unit (DPU)/Moser Framework
   - Gender Equality and Women’s Empowerment Framework
   - Life-cycle Framework.

6. Explain that a framework selects a few key factors for analysis out of a huge number that actually have an influence on any situation. This workshop will introduce a synthesis of tools from different frameworks so participants can learn about other tools to use in analysis, planning, or assessment.
7. Explain that there are ten (10) key questions to describe and analyse gender relations in a community or development context. Present the questions as given in the facilitators’ notes.

8. Explain that there are some specific tools to obtain more information using the ten (10) questions.

9. Present an overview of selected tools (from the following list) that may be useful in gender analysis in the context of participants’ organisations and projects:

   - Analysis of women’s and men’s roles (using the activity profile)
   - Assessment of access to, and control over, resources and benefits (using the resources profile)
   - Analysis of influencing factors, constraints and opportunities (using the context profile)
   - Analysis of Practical and Strategic Gender Needs
   - Gender Analysis Matrix
   - Gender Equality & Women’s Empowerment Framework.

(Refer to facilitators’ notes.)
Facilitators’ notes: Ten (10) key questions used to describe and analyse gender relations and development contexts

1. Who does what? (Activities)
3. Who owns what? (Ownership of assets)
4. Who is responsible for what? (Obligations)
5. Who is entitled to what? (Claims, rights)
6. Who controls what? (Income, spending)
7. Who decides what? (Power)
8. Who gets what? (Distribution)
9. Who gains and who loses? (Redistribution)
10. Why? What is the basis for this situation? (Rules, norms, customs)

Which roles are for men and which are for women?
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<th>Tool</th>
<th>Components</th>
<th>Purpose</th>
<th>Key Concepts</th>
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| Activity profile | - Activities that people do for their livelihood  
                  - The location of those activities  
                  - Whether it is men or women who do the activities (and age)  
                  - Frequency or intensity of activities | - To obtain a clear picture of the labour patterns of men and women, in order to reveal women’s and men’s vulnerability to:  
                  • Heavy workloads.  
                  • Time constraints.  
                  • Mobility constraints. | It divides work into the following categories:  
                  - Productive  
                  - Reproductive  
                  - Community |
| Resources profile| The tool has four columns showing resources of concern, access by gender  
                  control by gender and benefits derived from the use of the resources identified | - Reveal power relations between women and men  
                  - Highlights gender differences in vulnerability to resources constraints  
                  - Enable assessment of women’s and men’s capacities to participate in and benefit from development projects | - Resources  
                  - Benefits  
                  - Access  
                  - Control |
| Context profile  | - A tool for a situation analysis of the project area or target community  
                  - Identifies and describes the main trends, changes or norms of concern in the project area  
                  - Identifying past and present influences can give an indication of future shifts and trends  
                  - Trends can be social, economic, political, legal, environmental or demographic | - To identify the major influencing factors (trends, changes or norms) that affect development in the area  
                  - The opportunities for and constraints to development that are posed by the influencing factors: For men? For women?  
                  - To clarify the context in which to:  
                  • Define gender-sensitive development objectives  
                  • Draw up gender-sensitive project designs and implementation strategies. | - Influencing factors  
                  - Constraints  
                  - Opportunities |
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<th>Key Concepts</th>
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| Practical and strategic gender needs             | - Practical needs are linked to the condition and relate to daily needs, are easily identifiable and tend to be short term  
- Can be addressed by provision of specific inputs e.g., food relief  
- Improve women’s lives in general but do not alter traditional roles and the subordinate status of women  
- Strategic gender needs are linked to the position, tend to be long-term, not obviously identifiable  
- Can be addressed through awareness raising, education, political mobilisation | - To distinguish between short-term practical needs and long-term strategic needs of a marginalised population (e.g. women)  
- Can be used to assess the degree to which an existing project addresses the practical and strategic gender needs of a group or as part of the project design  
- Can be used to indicate what the project needs to do to address the group’s practical and strategic needs | - Practical gender needs  
- Strategic gender needs |
| Gender Analysis Matrix                           | - The identification and analysis of gender differences in order to access the different impact of development interventions  
- Four levels of analysis are women, men, household and community  
- Four categories of analysis are labour, time, resources and culture.  
- Analysis is done by a group within the community that should include equal numbers of men and women | - To determine the different impacts of development interventions on women and men with regard to labour, time, resources and culture  
- A tool for gender analysis at planning stage to determine whether potential gender effects are desirable and consistent with programme goals; at the design stages whether gender considerations may change the design of the project, or during monitoring and evaluation stages to address broader programme impacts | - Women, men, household and community  
- Labour, time, resources and cultural factors |
Activity 11: Applying gender analysis tools

Aim:

Apply at least four gender analysis tools and assess their appropriateness for use in HIV/AIDS work (Gender Division of Labour, Access, Control and Benefit Profile, Influencing Factors, Practical versus Strategic Needs)

Instructions:

1. Identify participants that have done and are familiar with PRA and ensure that they go into different groups.

2. Divide the participants into small groups according to the number of gender analysis tools being introduced in the session. Assign a gender analysis tool to each group and distribute the handouts corresponding to their assigned.

3. Ask the groups to study their tools and prepare to use them in a simulated situation involving project personnel and community members (6-10 people in a group). (Refer to case study provided earlier.) The groups will need to determine how they will work with community groups with whom they will conduct their simulated fieldwork:
   - Introductions
   - Introduction of the purpose of the training and of the fieldwork in particular
   - How they will organise themselves to conduct the analysis activity
   - Possible modifications of the process depending upon initial perceptions of the group.

4. Allow the groups approximately 1 hour (more if necessary) to study their tools, to determine the context in which they will use them (project and/or issues to which they will apply them), how they will organise the practice application of the tool, etc.

5. In the large group, each small group presents its assigned tool and conducts the analysis activity, involving the members of the large group as project staff and as community members. (Allow up to 30 minutes for each group’s presentation and analysis activity as necessary.)
6. Following each group’s mini-session:

- Ask the small group to summarise its results and to share them with the large group
- Discuss any questions participants may have regarding the tool and its application
- Lead a discussion of the group’s experience, including group members’ impressions of the utility of the tools, proposed modifications, etc.
- Distribute handouts corresponding to the tools just used to participants who do not already have them.
Activity 12: Selection and application of tools for analysis of organisational policies and programmes

Aim:

To enable participants to practice the selection and application of learned tools.

Instructions

1. Check that the participants have read Handout 4: Checklist for gender analysis of the project cycle and Handout 5: Situational analysis and project identification.

2. Ask participants to form small groups with colleagues from their organisations and to select and/or develop tools they can use to identify and analyse gender issues within their organisations’ programmes/projects.

3. In the large group, ask participants to identify the tools they have selected and describe how they plan to use them in gender analysis of their organisations’ policies or programmes.

Facilitators’ notes

Checklist of Questions for identifying women’s dimensions in the project cycle. See:

- Handout 4: Appendix 2: Checklist for gender analysis of the project cycle
- Handout 5: Appendix 3: Situational analysis and project identification.
Part 3: Mainstreaming gender in HIV and AIDS organisations

Aims:

To enable the participants to:

- Understand the rationale and key steps involved in mainstreaming gender in organisations working on HIV and AIDS
- Identify opportunities for mainstreaming gender in their own organisations.

Contents:

This Part contains:

- **Activity 13:** Why mainstream gender in organisations working on HIV and AIDS?
- **Activity 14:** Organisational gender frameworks
- **Activity 15:** Applying an organisational gender framework to your organisation.

Time:

This Part requires approximately 3 hours.

What to do in advance:

- Prepare *Handout 6: Mainstreaming Gender*, based on pages 11-16 of SAT’s *Mainstreaming Gender in Response to AIDS in Southern Africa*. Make a copy for each participant. (To be used in Activity 14)
- Develop an organisational gender framework (see Activity 14 for an example). Make a copy for each participant. (To be used in Activity 14)
- Develop an organisational gender assessment tool (see Activity 15 for an example). Make a copy for each participant. (To be used in Activity 15.)
Reference materials:


- Macdonald, Mandy et al. (1997), *Gender and Organisational Change: Bridging the Gap between Policy and Practice*, Royal Tropical Institute, Amsterdam, The Netherlands


Activity 13: Why mainstream gender in organisations working on HIV and AIDS?

Aim:
To enable participants to understand the rationale for mainstreaming gender in their organisations.

Instructions:
1. Explain the aims of the Part.
2. Explain the aim of the Activity.
3. Facilitate a ‘power walk’. Start by asking the participants to list typical members of a community in southern Africa (see facilitators’ notes for examples).
4. Ask the participants to identify which of these community members are marginalised and why.
5. Take the participants to a large space, either within the workshop building or outside. Ask them to stand side by side in a line.
6. Assign each participant one of the typical community members and ask them to think about their character (for example, giving them a name, age and family situation). Ask them not to tell the others who they will be role-playing.
7. Read out a statement (see facilitators’ notes for examples). Ask the participants to take one step forward if the statement applies to the community member they are role-playing.
8. Repeat the process until you have read out all of your statements
9. Ask those who are the furthest forward to say what community members they were role-playing. Ask them why they think their characters are at the front and how it felt to be leaving other people behind.
10. Ask those at the back to state what community members they were role-playing. Ask them why they think their characters are at the back and how it felt to be left behind by other people.
11. Explain that the community members at the back are the people that development programmes, including those on HIV and AIDS, should be prioritising.
12. Summarise the key points that have arisen from the Activity. Highlight the following facts:

- The power walk shows the power relations among different members of our communities and those whom HIV and AIDS programmes do not address.
- These power relations can happen in organisations as well as communities. Organisations are gendered structures and often reflect the gender roles and stereotypes of their local community.

13. Development organisations are in a powerful position because they often decide who benefits from programmes and who gets resources. They can sustain inequality between women and men through policies that are not gender-sensitive. These include ones that widen the economic differences between women and men and that fail to involve marginalised groups in decision-making.

14. Overall, it is vital that the people managing and implementing HIV and AIDS programmes do not ignore the needs and interests of the most marginalised members of society.

Facilitators’ notes: Examples of typical community members

<table>
<thead>
<tr>
<th>Female councillor</th>
<th>Male orphan aged 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male village chairperson</td>
<td>Female orphan aged 13</td>
</tr>
<tr>
<td>Female village shopkeeper</td>
<td>Mother aged 15</td>
</tr>
<tr>
<td>Male village health worker</td>
<td>Uncle taking care of orphans</td>
</tr>
<tr>
<td>Female traditional birth attendant</td>
<td>Grandmother taking care of orphans</td>
</tr>
<tr>
<td>Female schoolteacher</td>
<td>Girl of 16 looking after her sick mother and younger siblings</td>
</tr>
<tr>
<td>Male ward agricultural officer</td>
<td>Male village elder</td>
</tr>
<tr>
<td>Male leader of a youth group</td>
<td>Female village elder</td>
</tr>
<tr>
<td>Male unemployed person aged 17</td>
<td>Male primary school pupil</td>
</tr>
<tr>
<td>Male living with HIV and AIDS aged 24</td>
<td>Female primary school pupil</td>
</tr>
<tr>
<td>Female living with HIV and AIDS aged 24</td>
<td>Widow aged 30, whose husband died of AIDS</td>
</tr>
</tbody>
</table>
Facilitators' notes: Examples of statements

1. “I can influence decisions made at ward level.”
2. “I get to meet visiting government officials.”
3. “I get new clothes on religious holidays.”
4. “I can read newspapers regularly.”
5. “I have time and access to listen to the radio.”
6. “I never have to queue at the dispensary.”
7. “I have access to micro credit.”
8. “I can speak at meetings of my extended family.”
9. “I can afford to boil drinking water.”
10. “I can buy condoms.”
11. “I can negotiate the use of condoms with my partner.”
12. “I expect to go to secondary school.”
13. “I am consulted on issues affecting young people in our community.”
14. “I can pay for treatment at a private hospital if necessary.”
15. “I can speak at village meetings.”
16. “I eat at least two full meals a day.”
17. “I sometimes attend workshops and seminars.”
18. “I have access to plenty of information about HIV and AIDS.”
19. “I am not in danger of being sexually harassed or abused.”
20. “I own a small business.”
Activity 14: Organisational gender frameworks

Aim:
To enable the participants to understand the rationale for and steps involved in mainstreaming gender in organisations working on HIV and AIDS.

Instructions:
1. Explain the aim of the Activity.
2. Check that participants have read Handout 6: Mainstreaming gender.
3. Make a brief presentation on why it is important to mainstream gender in organisations working on HIV and AIDS (see facilitators’ notes).
4. Give each participant a copy of an organisational gender framework (see facilitators’ notes). Explain that:
   • The framework focuses on three areas:
     1. Organisation’s mission and mandate.
     2. Organisation’s structure.
     3. Organisation’s human resources.
   • Combined, these areas enable you to take a technical, policy and cultural view of your organisation in relation to gender.
5. Make a presentation about the aspects covered by the three areas of the framework (see facilitators’ notes).
6. Facilitate a discussion about the organisational gender framework. Encourage participants to ask for clarifications and to share their own experiences about the subject.
7. Summarise the key points arising from the Activity.
Facilitators’ notes: Why is it important to mainstream gender in organisations working on HIV and AIDS?

- Development organisations, including those working on HIV and AIDS, are gendered structures. Gendered policies and practices lead to gendered outcomes and personnel who, whatever their sex, can make discrimination better or worse.

- Gender needs to be mainstreamed in every aspect of an organisation. This includes paying attention to who is recruited, who receives staff development and how procedures affect women and men differently. It also involves looking at the goals and content of an organisation’s programmes, including who is being targeted and who is being excluded.

- As a starting point, organisations need to look at their systems, structures and people from a gender perspective. This involves paying attention to areas such as how women and men relate to each other and what helps or hinders opportunities for women.

- Gender tends to be forgotten in organisational development. Often, women raise it as an afterthought when they think they have been neglected. The challenges are how to build in gender analysis from the beginning and how to ensure that all capacity building is based on an understanding that women and men – as well as different types of women and men – experience organisations in different ways.

- A key area to examine is organisational culture. This involves looking at how an organisation does things and how different attitudes, behaviour and interests shape it (see Helpful Hint).

- A gender-sensitive approach enables an organisation’s programmers, planners and implementers to understand the relationship between gender and HIV and AIDS. This understanding helps them to develop gender-sensitive plans, strategies and programmes that will have more sustainable outcomes.

Helpful hint!

To explain how an organisation’s culture works, draw a picture of the inside of an onion. Explain that the outer layers are the obvious aspects of the culture that are easily visible and communicated in public presentations, etc. Then, as the onion is peeled, the second layer is visible – the heroines and heroes of the organisation, the people who influence what the organisation really stands for. Finally, the centre layer represents the organisation’s ‘heart’ and core values.
## Facilitators’ notes: Organisational gender framework

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td></td>
<td>1.1. Policies and action</td>
<td>2.1. Tasks and responsibilities</td>
<td>3.1. Staff and expertise</td>
</tr>
<tr>
<td>Policy viewpoint</td>
<td>1.2. Policy influence</td>
<td>2.2. Decision-making</td>
<td>3.2. Rewards and opportunities</td>
</tr>
<tr>
<td>Cultural viewpoint</td>
<td>1.3. Organisational culture</td>
<td>2.3. Co-operation and learning</td>
<td>3.3. Attitude</td>
</tr>
</tbody>
</table>

## Facilitators’ notes: Organisational gender framework

1. Organisation’s mission and mandate

1.1. Policies and action

This includes whether the organisation:

- Has a mission based on a thorough gender analysis
- Has a clear policy on gender, with an Activity plan and timeframe
- Allocates adequate financial resources to gender work
- Uses gender-disaggregated data in its evaluation and planning
- Contributes to changing unequal gender relations among its target groups.
1.2. Policy influence

This includes whether the organisation has a management that:

- Takes responsibility for developing and implementing gender policies
- Promotes internal consultation about gender policies
- Communicates with external stakeholders involved in gender work
- Takes the opinions of external stakeholders seriously
- Employs female and male managers with relevant skills to address gender and communicate a vision of an organisation committed to equality.

1.3. Organisational culture

This includes whether the organisation:

- Has values that reflect an understanding of and commitment to gender work
- Enables people to be honest about their strengths and weaknesses, including about gender
- Accepts people of a different gender, race, sexual orientation, HIV status, etc
- Takes positive steps to include people who do not fit the organisational norm
- Allows staff to organise in relation to their identity, such as their religion, disability or sexual orientation
- Takes sexual harassment seriously.

2. Organisational structure

2.1. Tasks and responsibilities

This includes whether the organisation:

- Has staff roles and responsibilities that are appropriate for a mandate addressing gender
- Has an appropriate number of women among its staff and volunteers
- Has women in positions that make good use of their skills and capacity
- Has women in positions of power and influence, including those in relation to promoting gender issues.
2.2. Decision-making

This includes whether the organisation:

• Takes the lessons of other groups into account for its decision making about gender
• Enables all staff to participate in decision making
• Makes gender-related decisions in a timely manner
• Has decision makers with the capacity to resolve conflicts in a way that supports both men and women
• Takes decisions about gender at an appropriate level
• Has a structure that positively affects how gender work is carried out.

2.3. Co-operation and learning

This includes whether the organisation:

• Promotes teamwork among women and men
• Enables all staff to take part in discussions about gender
• Encourages networking with a variety of external groups
• Promotes collaboration with women’s and gender groups
• Welcomes and incorporates new ideas and practices promotes learning and innovation among its staff and volunteers.

3. Organisation’s human resources

3.1. Staff and expertise

This includes whether the organisation:

• Has a management that is committed to female representation at all levels
• Pays attention to gender in the recruitment of new staff
• Provides equal wages for women and men
• Has job descriptions that reflect people’s responsibilities in relation to gender
• Ensures a gradual increase in gender expertise among staff.
3.2. Rewards and opportunities

This includes whether the organisation:

- Has an infrastructure that enables female staff to work suitable hours
- Rewards staff for good performance in relation to gender
- Provides equal rewards for women and men
- Has a staff that values different styles of working
- Provides opportunities for career development and personal growth.

3.3. Attitude

This includes whether the organisation:

- Has a staff that is enthusiastic and committed to gender equality
- Has a staff that is open to new ideas
- Encourages gender to be discussed openly among women and men
- Has a staff that acknowledges that gender discrimination is a reality
- Has a staff that takes action on gender stereotyping.
Activity 15: Assessing existing knowledge, skills and experience

Aim:

To enable the participants to apply an organisational gender framework to their own organisations.

Instructions:

1. Explain the aim of the Activity.
2. Introduce the Activity by emphasising that:
   - Gender mainstreaming is based on the recognition that organisations working on HIV and AIDS are themselves gendered structures
   - To mainstream gender in HIV and AIDS work, organisations need to start at home, in terms of looking at their internal policies, structure and culture. These reflect the power relations that exist within the organisation, including those between women and men and between different types of women and men.
3. Ask the participants to work with colleagues from their own organisation. If they do not have colleagues with them, ask them to work on their own.
4. Give the participants a copy of an organisational gender assessment tool (see facilitators’ notes). Ask them to assess their own organisation by considering each question and giving a score of:
   - 3 for high performance
   - 2 for medium performance
   - 1 for low performance.
5. Ask the participants to add up the total scores. Based on the results, ask them to identify their organisation’s strengths and weaknesses in relation to mainstreaming gender.
6. Ask the participants to identify what practical changes their organisations need to make to maximise their strengths and address their weaknesses.
7. Bring everybody back together. Ask the participants to present their conclusions.
8. Summarise the key point arising from the Activity.
# Organisational gender assessment tool

**1. Organisation’s mission and mandate**

**1.1. Policies and action**

| Score |  
|-------|---
| • Are the organisation’s mission and mandate based on a thorough analysis of its context, including gender? |  
| • Does the organisation have a clear policy on gender? |  
| • Does the gender policy have an activity plan and timeframe? |  
| • Does the organisation give adequate financial resources to implementing gender policy? |  
| • Does the organisation use gender-disaggregated data and information in its monitoring, evaluation and strategic planning? |  
| • Does the organisation contribute to empowering women and changing unequal gender relations among its target groups? |  

Total score: 59

**1.2. Policy influence**

| Score |  
|-------|---
| • Do the management and Board take responsibility for developing and implementing policies on gender? |  
| • Does the management promote internal consultation about developing and implementing policies on gender? |  
| • Is there communication with external stakeholders involved in gender work, such as networks, policy-makers and donors? |  
| • Does the management value and take seriously the opinions of those external stakeholders? |  
| • Do managers have the relevant skills and resources to address gender issues? |  
| • Do female and male managers provide dynamic leadership and communicate a vision of an organisation committed to equality? |  

Total score: 59
### 1.3. Organisational culture

- Do the organisation’s direction and values reflect an understanding of and commitment to gender issues?
- Does the organisation enable people to be honest about their weaknesses and strengths, including in relation to gender?
- Is the organisation’s culture accepting of people of a different gender, race, sexual orientation, HIV status, etc?
- Does the organisation take steps to include people who do not fit the organisational norm?
- Does the organisation allow staff to organise in relation to their identity, such as their religion, disability or sexual orientation?
- Does the organisation take sexual harassment seriously?

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<th>Total score</th>
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### 2. Organisation’s structure

#### 2.1. Tasks and responsibilities

- Are the roles and responsibilities of staff and volunteers appropriate for achieving a mandate that addresses gender?
- Are the roles and responsibilities for gender work clear within the organisation?
- Are there an appropriate number of women in the organisation?
- Are women in positions that make good use of their skills and capacity?
- Are women in positions of power and influence within the organisation?
- Are women, alongside their male colleagues, in a position to promote gender needs throughout the organisation?

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<tr>
<th>Total score</th>
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</table>
### 2.2. Decision-making

<table>
<thead>
<tr>
<th>Question</th>
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</thead>
<tbody>
<tr>
<td>Do decisions taken within the organisation consider what other groups working on gender have learned?</td>
<td></td>
</tr>
<tr>
<td>Do all of the staff, including those with expertise on gender, participate in decision-making in the organisation?</td>
<td></td>
</tr>
<tr>
<td>Are decisions about gender dealt with in a timely manner within the organisation?</td>
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</tr>
<tr>
<td>Do the organisation’s decision-makers have the capacity to resolve conflicts in a way that supports both men and women?</td>
<td></td>
</tr>
<tr>
<td>Are decisions about gender taken at an appropriate level?</td>
<td></td>
</tr>
<tr>
<td>Does the structure of the organisation have a positive influence on how it carries out its gender-related work? For example, is it non-hierarchal enough to encourage staff and volunteers from marginalised groups to participate?</td>
<td></td>
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</tbody>
</table>

#### Total score

### 2.3. Co-operation and learning

<table>
<thead>
<tr>
<th>Question</th>
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<tbody>
<tr>
<td>Does the organisation promote teamwork among women and men?</td>
<td></td>
</tr>
<tr>
<td>Do all staff members take part in discussions about gender?</td>
<td></td>
</tr>
<tr>
<td>Is networking encouraged with a variety of external groups that can bring different experiences, including those in relation to gender?</td>
<td></td>
</tr>
<tr>
<td>Does the organisation promote exchange and collaboration with women’s organisations and gender groups?</td>
<td></td>
</tr>
<tr>
<td>Does the organisation welcome new and innovative ideas and practices and incorporate them into its practices?</td>
<td></td>
</tr>
<tr>
<td>Does the organisation promote learning and innovation among its staff, volunteers and stakeholders, whether female or male?</td>
<td></td>
</tr>
</tbody>
</table>

#### Total score
3. Organisation’s human resources

3.1. Staff and expertise

- Is management committed to promoting female representation at all levels of the organisation, including the Board?
- Is this commitment translated into a timeframe and concrete targets?
- Does the selection of new staff include attention to their capacity to deal with gender issues?
- Do women and men in the organisation receive equal wages for equal work?
- Do job descriptions outline people’s responsibilities for gender work?
- Is there a gradual increase in gender expertise among the organisation’s staff, as a result, for example, of training?

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<tr>
<th>Total score</th>
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</table>

3.2. Rewards and opportunities

- Does the organisation have adequate infrastructure to give female staff access to facilities and to work suitable hours?
- Does the organisation reward good performance in relation to gender work? For example, are individual members of staff congratulated?
- Does the organisation reward good performance by women and men in an equal way?
- Do staff members value different styles of working, such as an informal working environment and women and men having non-traditional roles?
- Are there opportunities for women and men to develop their careers within the organisation?
- Are there opportunities for women and men to achieve personal growth within the organisation?

<table>
<thead>
<tr>
<th>Total score</th>
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</thead>
</table>
### 3.3. Attitude

<table>
<thead>
<tr>
<th>Question</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Are the organisation’s staff members enthusiastic about the work they do?</td>
<td></td>
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<tr>
<td>Are staff members committed to gender equality?</td>
<td></td>
</tr>
<tr>
<td>Are staff members open to new ideas and willing to change their practices?</td>
<td></td>
</tr>
<tr>
<td>Is gender taken seriously and discussed openly by women and men within the organisation?</td>
<td></td>
</tr>
<tr>
<td>Do staff members acknowledge that gender discrimination is a reality, including within their organisation?</td>
<td></td>
</tr>
<tr>
<td>Do staff members take action on gender stereotyping within the organisation?</td>
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<table>
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<tr>
<th>Total score</th>
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</table>
Part 4: Mainstreaming gender in HIV and AIDS programmes

Aims:

To enable the participants to:

- Understand the rationale and steps involved in mainstreaming gender in programmes on HIV and AIDS
- Identify opportunities for mainstreaming gender in programmes on HIV and AIDS.

Contents:

This Part contains:

- Activity 16: Mainstreaming gender in the key steps for HIV and AIDS programming
- Activity 17: Applying gender mainstreaming to the key steps for HIV and AIDS programming
- Activity 18: Collecting gender-disaggregated data
- Activity 19: Gender mainstreaming in specific HIV and AIDS programmes.

Time:

This Part requires approximately 3 hours.
**What to do in advance:**

- Prepare *Handout 7: Gender Mainstreaming in the Programme Cycle*, based on pages 17-26 of SAT’s *Mainstreaming Gender in Response to AIDS in Southern Africa*. Make a copy for each participant. (To be used in Activity 16)

- Prepare a list of the key steps involved in HIV and AIDS programming and the questions that organisations need to ask themselves in order to mainstream gender in each step (see Activity 16 for an example). Make a copy for each participant. (To be used in Activity 16)

- Prepare an assessment chart for the key steps for HIV and AIDS programming (see Activity 17 for an example). Make a copy for each participant. (To be used in Activity 17)

- Prepare *Handout 8: Gender Mainstreaming Tools*, based on pages 53-58 of SAT’s *Mainstreaming Gender in Response to AIDS in Southern Africa*. Make a copy for each participant. (To be used in Activity 18)

- Prepare *Handout 9: Mainstreaming Gender in Specific Programmes*, based on pages 27-39 of SAT’s *Mainstreaming Gender in Response to AIDS in Southern Africa*. Make a copy for each participant. (To be used in Activity 19.)

**Reference materials:**

Activity 16: Mainstreaming gender in the key steps for HIV and AIDS programming

Aim:

To enable the participants to explore how to mainstream gender in the key steps involved in HIV and AIDS programming.

Instructions:

1. Explain the aim of the Activity.
2. Check that the participants have read Handout 7: Gender Mainstreaming in the Programme Cycle.
3. Facilitate a discussion about why it is important to mainstream gender in HIV and AIDS programmes.
4. Draw a diagram of the programme cycle on a flipchart and check that participants are familiar with it (see facilitators’ notes).
5. Explain that programming involves seven key steps:
   1. Situation and context analysis
   2. Problem identification
   3. Objectives
   4. Strategies and results
   5. Activities
   6. Resources
   7. Monitoring and evaluation.
6. Make a presentation on the key questions that organisations need to ask themselves in order to mainstream gender in each of those steps (see facilitators’ notes).
7. Summarise the key points arising from the Activity. Highlight the fact that:
   - The planning phase of programmes offers the greatest opportunity for mainstreaming gender in programmes. This is because it enables consideration of gender-related issues from the very start.
Facilitators' notes: Diagram of the programme cycle

- Problem identification and preparation
  - Evaluation
  - Implementation and monitoring
  - Design
Facilitators’ notes: Questions to ask in order to mainstream gender in the key steps of HIV and AIDS programming

1. Situation and context analysis
   - Who should you involve in your analysis? How can you make sure that the voices and experiences of different types of people – including women and men of different ages and people living with HIV and AIDS – are heard?
   - What does a gender-sensitive approach mean in terms of how and when to carry out your analysis?
   - How can you assess who else is involved in gender work, what they are doing, why they doing it, where they are doing it and how effective they are being?
   - How can your analysis uncover the hidden factors that influence local gender relations and inequalities?
   - What do you need to do to ensure that the information you collect is gender-disaggregated?

2. Problem identification
   - What are the key problems that emerged from your situation analysis?
   - In what way are the problems related to gender? For example, what did you discover about who has control over resources and what needs to be done to address inequalities?
   - What does the gender-disaggregated data that you have collected tell you about the problem? For example, which women and men does it affect and how does it affect women and men differently?

3. Objectives
   - How can the problems be addressed and lead to the outcomes you want?
   - Are your objectives gender-sensitive and SMART (specific, measurable, appropriate, relevant and time-bound)?
**4. Strategies and results**

- How can you achieve your objectives? For example, how can you empower people and remove inequalities?
- In what way do your strategies address women’s and men’s different needs and work towards gender equality?
- How can you encourage local ownership of the programme among both women and men?

**5. Activities**

- What has to happen to put the strategies into action? For example, if your strategy focuses on advocacy, do you want to have public rallies, workshops and/or meetings with policy makers?
- How do your activities relate to your gender-sensitive objectives?

**6. Resources**

- What resources will be needed, for example, funding, skills and time?
- Does your organisation have the existing capacity to address gender issues? If not, how can it build it?
- Who will be responsible for promoting your gender-related work? Are they involved in decision-making processes?

**7. Monitoring and evaluation**

- How can you build gender-sensitive monitoring into every step of your programme?
- What baseline data are needed? What is available?
- What gender-sensitive indicators do you need? In particular, how can you measure qualitative changes in relation to gender, such as changes in attitude?
- What tools can you use to capture gender-disaggregated data?
- Who gets to lead and participate in your evaluation work? How can you involve both women and men?
Activity 17: Applying gender mainstreaming to the key steps for HIV and AIDS programming

Aim:
To enable the participants to apply gender mainstreaming to the key steps involved in HIV and AIDS programming.

Instructions:

1. Explain the aim of the Activity.

2. Give each participant a copy of an assessment chart for mainstreaming gender in the key steps for HIV and AIDS programming on a flipchart (see facilitators’ notes). Explain how the chart works and provide examples of the type of things to write in the blank columns.

3. Ask the participants to work with colleagues from their own organisation. Ask them to use the gender analysis chart to look at the seven stages of their HIV and AIDS programming one-by-one and to:
   • Assess the strengths of their gender mainstreaming to date
   • Assess the weaknesses of their gender mainstreaming to date
   • Develop ideas about how to improve their gender mainstreaming in the future.

4. Bring everybody back together. Ask the participants to present their conclusions.

5. Summarise the key points arising from the Activity.
Facilitators’ notes: Assessment chart for mainstreaming gender into the key steps for HIV and AIDS programming

<table>
<thead>
<tr>
<th>Key steps for HIV and AIDS programming</th>
<th>Strengths of our gender mainstreaming to date</th>
<th>Weaknesses of our gender mainstreaming to date</th>
<th>Ideas for improving our gender mainstreaming</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Situation and context analysis</td>
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<td>2. Problem identification</td>
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<td>3. Objectives</td>
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<td>4. Strategies and results</td>
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<td>5. Activities</td>
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<td>6. Resources</td>
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<tr>
<td>7. Monitoring and evaluation</td>
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Activity 18: Collecting gender-disaggregated data

Aim:
To enable the participants to increase their knowledge about why and how to collect gender-disaggregated data.

Instructions:
1. Explain the aim of the Activity.
2. Check that the participants have read Handout 8: Gender Mainstreaming Tools.
3. Facilitate a brainstorm about what is meant by gender-disaggregated data (see facilitators’ notes).
4. Facilitate a discussion about how gender-disaggregated data could help in relation to each of the seven key steps involved in HIV and AIDS programming.
5. Divide the participants into small groups. Ask the groups to:
   - Discuss the information and tools included in Handout 8: Gender Mainstreaming Tools
   - Identify how the information and tools might be incorporated into their own HIV and AIDS programming.
6. Summarise the key points arising from the Activity.

Facilitators’ notes: Gender-disaggregated data

Gender-disaggregated data refers to numbers or proportions reported according to sex.

Examples include:
- Data about how many women and how many men attended counselling services
- Data about the number of HIV infections among women and men.
Activity 19: Gender mainstreaming in specific HIV and AIDS programmes

Aim:
To enable participants to increase their knowledge about how to mainstream gender in different types of HIV and AIDS programmes.

Instructions:
1. Explain the aim of the Activity.
2. Check that participants have read *Handout 9: Mainstreaming Gender in Specific Programmes*.
3. Divide the participants into three groups:
   - Information, education and communication (IEC)
   - Home-based care (HBC)
   - Counselling.
4. Encourage the participants to select the group that best suits the HIV and AIDS work carried out by their organisation.
5. Ask each group to discuss the section of *Handout 8: Mainstreaming Gender in Specific Programmes* that applies to their type of HIV and AIDS work.
6. Ask each group to identify practical ways to mainstream gender in each of the seven key steps for programming their type of HIV and AIDS work.
7. Summarise the key points arising from the Activity.
Part 5: Mainstreaming gender in HIV and AIDS policies

Aims:

To enable the participants to:

- Understand why and how gender should be mainstreamed in organisational and national policies, particularly in relation to HIV and AIDS
- Be able to apply gender mainstreaming to their own organisational and national policies, particularly in relation to HIV and AIDS.

Contents:

This Part contains:

- **Activity 20:** What are policies and why do they matter?
- **Activity 21:** Why mainstream gender in HIV and AIDS policies?
- **Activity 22:** How to involve women in policy-making on HIV and AIDS
- **Activity 23:** Understanding practical and strategic gender needs
- **Activity 24:** Applying practical and strategic gender needs to organisational level policy-making
- **Activity 25:** Applying gender mainstreaming to national-level HIV and AIDS policies.

Time:

This Part requires approximately 3 hours.
What to do in advance:

- Prepare Handout 10: The Place of Gender Issues in AIDS Programmes and Policies/The Basis of Gender Mainstreaming, based on pages 11-16 of SAT’s Mainstreaming Gender in Response to AIDS in Southern Africa. Make a copy for each participant. (To be used in Activity 21)

- If possible, get a copy of a video – such as ‘Why did Mrs. X die?’ (available from UNICEF or gender organisations) – that shows what happens if policies are not gender-sensitive. (To be used in Activity 21)

- Prepare a case study on applying practical and strategic gender needs to everyday policy decision-making (see Activity 24 for an example). (To be used in Activity 24)

- Prepare a case study of Citizen X, a typical woman from a southern African country (see Activity 25 for an example). Make a copy for each participant. (To be used in Activity 25.)

Reference materials:


**Activity 20: What are policies and why do they matter?**

**Aim:**
To enable the participants to understand what policies are, how they affect HIV and AIDS work and how they differ at organisational and national levels.

**Instructions:**

1. Explain the aim of the Part.
2. Explain the aim of the Activity.
3. Introduce the Activity by explaining that:
   - Policies provide a framework for implementing programmes and allocating resources at different levels, including organisational and national
   - Policies reflect social and political intentions. They provide an enabling or a constraining environment for development work
   - Policies, including those on HIV and AIDS, affect women and men in different ways.
4. Ask the participants to share some examples of organisational and national level policies relating to gender and HIV and AIDS. These might include policies that affect their work in areas such as:
   - Home-based care (HBC) for the sick
   - Support for orphans
   - Provision of condoms
   - Provision of antiretroviral drugs
   - Voluntary counselling and testing (VCT)
   - Services for out-of-school youths.
5. Use some of the examples given by the participants to highlight the differences between organisational and national level policies. If clear examples have not been given, use some of your own (see facilitators’ notes).
6. Highlight the difference between internal and external organisational policies relating to gender (see facilitators’ notes). Use some of the examples given by the participants to show what this difference means in practice.
7. Summarise the key points arising from the Activity. Highlight the following facts:
   - Policies exist at many different levels, including household, organisational, national and international
   - Different levels of policies often influence each other. In particular, international policies influence national policies, while national policies influence organisational policies.
**Facilitators’ notes: Chart to analyse the differences between organisational and national level policies**

<table>
<thead>
<tr>
<th>Examples of organisational-level policies</th>
<th>Examples of national-level policies</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Policy on providing training for HIV and AIDS counsellors</td>
<td>• Policy on a multisectoral approach to HIV and AIDS</td>
</tr>
<tr>
<td>• Policy on supporting staff living with HIV and AIDS</td>
<td>• Policy on providing antiretroviral drugs to people living with HIV and AIDS</td>
</tr>
</tbody>
</table>

**Facilitators’ notes: Mainstreaming gender in internal and external organisational policies**

<table>
<thead>
<tr>
<th>Internal organisational policies (e.g. those on insurance, finances, human resources, training, etc.)</th>
<th>External organisational policies (e.g. those at sectoral, national and international level)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Key questions include:</strong></td>
<td><strong>Key questions include:</strong></td>
</tr>
<tr>
<td>• How does the organisation’s commitment to addressing gender inequalities show in its policies for areas such as recruitment, leave and medical insurance?</td>
<td>• How is gender built into the organisation’s analysis of its external environment?</td>
</tr>
<tr>
<td>• Does the organisation have an official policy on gender mainstreaming? Is it written down? Does the staff know about it? How is it monitored and by whom?</td>
<td>• How do the organisation’s external policy objectives reflect a gender analysis?</td>
</tr>
<tr>
<td></td>
<td>• How are the outcomes of the organisation’s external policy objectives monitored and by whom?</td>
</tr>
</tbody>
</table>
Activity 21: Why mainstream gender in HIV and AIDS policies

Aim:
To enable the participants to understand the rationale for mainstreaming gender in policies on HIV and AIDS.

Instructions:
1. Explain the aim of the Activity.
2. Check that participants have read Handout 10: The Place of Gender Issues in AIDS Programmes and Policies/The Basis of Gender Mainstreaming.
3. Facilitate a discussion based on the question:
   - “Why mainstream gender in HIV and AIDS policies?”
4. If possible, show a video (such as ‘Why did Mrs X die?’) that shows the consequences of policies that are not gender sensitive.
5. Summarise the key points that have arisen from the Activity. Highlight the following facts:
   - Society is gendered and so are the institutions that make its policies
   - The participation of poor women and poor men in policy-making is vital to ensuring that institutions are more gender-sensitive, effective and sustainable
   - It is particularly important to identify the links between women’s poverty and national-level political and economic policies
   - HIV and AIDS programmes need to link to key national and international policy commitments on gender (see facilitators’ notes)
   - Advocacy is central to encouraging policy-makers to be both more gender sensitive and more focused on civil society.
Facilitators’ notes: Examples of international policy commitments on gender

Beijing Platform for Action:
This is an international agenda for women’s empowerment. It aims to remove obstacles to women’s active participation in all spheres of public and private life through a full and equal share in economic, social, cultural and political decision-making. Through it, the international community and civil society, including NGOs and the private sector, are called on to take strategic action in the following areas:

• The persistent and increasing burden of poverty on women
• Inequalities in access to education and training
• Inequalities in access to health care and related services
• Violence against women
• The effects of armed or other kinds of conflict on women, including those living under foreign occupation
• Inequality in economic structures and policies, in all forms of productive activities and in access to resources
• Inequality between men and women in the sharing of power and decision-making at all levels
• Insufficient mechanisms at all levels to promote the advancement of women
• Lack of respect for and inadequate promotion and protection of human rights for women
• Stereotyping of women and inequality in women’s access to and participation in all communication systems, especially in the media
• Gender inequalities in the management of natural resources and in the safeguarding of the environment
• Persistent discrimination against and violation of the rights of the female child.
SADC Gender and Development Declaration:

In 1997, as a follow up to the Beijing Conference, SADC Heads of State met in Blantyre, Malawi, and signed the Gender and Development Declaration. This committed the Heads of State and their Governments to:

- Achieving a target of at least 30% of women in political and decision-making structures by 2005
- Promoting women’s full access to, and control over, productive resources – to reduce the level of poverty among women
- Repealing and reforming all laws, amending constitutions and changing social practices that still subject women to discrimination
- Taking urgent measures to prevent and deal with increasing levels of violence against women and children.
Activity 22: How to involve women in policy-making on HIV and AIDS

Aim:
To enable the participants to explore different ways to involve women and their needs in policy-making.

Instructions:
1. Explain the aim of the Activity.
2. Make a brief presentation about different strategies for involving women in policy making on HIV and AIDS and give examples of what they mean in practice (see facilitators’ notes).
3. Summarise the key points arising from the Activity.

Facilitators’ notes: Strategies for involving women in policy-making on HIV and AIDS

Segregationist strategies:
These policies focus on welfare objectives, but do not look at the underlying issues. An example would be a policy that leads to the arrest of sex workers, but that does not look at what makes women do sex work in the first place.

Integrationist strategies:
These policies do not aim to change the situation; they deal with practical issues, rather than strategic needs. An example would be a policy that recognises the poverty of women and their vulnerability to HIV, but does not try to change the context in which this happens.

Transformative strategies:
These policies aim to change development approaches. They have more radical goals and possibly can provide women and other marginalised groups with greater ownership of the political agenda. An example would be a policy that recognises that HIV and AIDS is more than a health concern and is about issues such as gender, power and access to resources.
Activity 23: Understanding practical and strategic gender needs

Aim:
To enable the participants to understand the difference between practical and strategic gender needs.

Instructions:
1. Explain the aim of the Activity.
2. Make a brief presentation about practical and strategic gender needs and the difference between them (see facilitators’ notes).
3. Read out a brief case study on practical and strategic needs and write the options for action on a flipchart (see facilitators’ notes).
4. Facilitate a discussion about:
   • Which of these options addresses a practical need?
   • Which of these options addresses a strategic need?
5. Summarise the key points that have arisen from the Activity. Highlight the following facts:
   • There are key differences between practical and strategic needs
   • The case study draws from the age-old wisdom that if you give a person a fish, they will be hungry the next day; but, if you teach a person how to fish, they will always be able feed themselves.
Facilitators’ notes: Practical and strategic gender needs

Practical gender needs

- Women identify these needs within their socially-accepted roles in society. They do not challenge the division of labour between women and men or women’s subordinate position.
- They respond to an immediate need that is identified within a specific context.
- They are practical in nature and are often concerned with inadequate living conditions, such as poor water, health care and employment.

Strategic gender needs

- Women identify these needs because of their subordinate position to men in society. They vary according to specific contexts.
- They relate to the gender division of labour, power and control. As such, they include issues such as legal rights, domestic violence, equal wages and women’s control over their bodies.
- Meeting these needs helps women to achieve greater equality. It changes existing roles and therefore challenges women’s subordinate position.

Facilitators’ notes: Case study on practical and strategic needs

You see a beggar in the street. You have three options:

- Option 1: Give the beggar money
- Option 2: Take the beggar to a welfare organisation
- Option 3: Help the beggar to find a job.
Activity 24: Applying practical and strategic gender needs to organisational-level policy-making

Aim:
To enable the participants to apply practical and strategic gender needs to everyday policy decisions, including those in relation to HIV and AIDS.

Instructions:
1. Explain the aim of the Activity.
2. Provide participants with copies of a case study about applying practical and strategic gender needs to everyday policy decisions (see facilitators’ notes). Ask them to read it.
3. Ask the participants to identify:
   • Which of the options would meet the practical needs of the women in the community?
   • Which of the options would meet the strategic needs of the women in the community?
   • How would you decide how to spend the money? Why?
   • What challenges would you face in making your decision and how would you overcome them?
4. Summarise the key points arising from the Activity.
   Highlight the following facts:
   • This seems like an everyday dilemma about short-term versus long-term benefits and the impact of donors forcing organisations to make rapid and difficult decisions. The situation, however, is actually more complicated
   • Children, especially girls, are dropping out of school because their parents do not have the money to pay for their school fees. A project with a quick cash return could serve the strategic purpose of getting girls back into school. This shows that the choices between strategic and practical needs are not always simple. In reality, it may be necessary to have approaches that address both
   • One of the risks of the land reform option is that it will cause resistance from men. This highlights the central difference between achieving gender equality rather than just women’s empowerment. Unless men’s thinking is changed in the process, the empowerment of women may be a hollow victory. Transforming power relations between women and men must be the ultimate objective.
Facilitators’ notes: Case study on applying practical and strategic gender needs to everyday policy decisions

A donor has given your organisation a grant for a project to support women in relation to HIV and AIDS. You call a meeting of women in the village to consult them on how best to spend the money.

Some women feel that the money should help them acquire titles to land and to gain access to credit for agricultural inputs. You know that this would cause resistance by men, even though the country’s Constitution makes provision for it. Meanwhile, other women feel that the money should be used to start sewing and knitting clubs to generate immediate income to pay school fees for children and to buy medicines. Government has recently introduced school and health fees because of a Structural Adjustment Programme. The community is very poor and many children, especially girls, have dropped out of school.

If the grant is not spent this year, you will lose it. You urgently need to write a proposal for the Donor. You are anxious to do something to help the women in the community, but you are beginning to doubt your ability to deliver.
Activity 25: Applying gender mainstreaming to national-level HIV and AIDS policies

Aim:
To enable the participants to apply the principles of gender mainstreaming to national-level policies on HIV and AIDS.

Instructions:
1. Explain the aim of the Activity.
2. Divide the participants into small groups. Give each participant a copy of a case study about Citizen X (see facilitators’ notes). Ask them to read it and to discuss it with their group members.
3. Ask each group to:
   • Develop a set of national policies that would make a practical and strategic difference to the life of Citizen X
   • Explain in what ways the policies would need to be gender-sensitive
   • Identify which government Ministries would need to be involved in developing and implementing the policies.
4. Bring everybody back together. Ask the small groups to present their conclusions.
5. Summarise the key points arising from the Activity. Highlight that the case study showed that:
   • For genuine change in Citizen X’s life, every government ministry would need to be involved. For example: the Ministry of Water should provide safe water nearby; the Ministry of Education should provide adult learning; the Ministry of Agriculture should provide land and training; the Ministry of Trade and Industry should support small- and medium-scale enterprises; and the Ministry of Health should provide a local clinic
   • With gender mainstreaming, the chain is only as strong as its weakest link. Unless all stakeholders are gender sensitive and committed to fighting discrimination, equality will not become a reality.
Citizen X is a woman in a southern African country. The following are some facts about her:

- She is 20 years old.
- Her husband died of AIDS last year. She does not know if she or her two children are HIV-positive, but her son has had pneumonia and her daughter has TB.
- There is no clinic in the area. She has to walk 20 km to get treatment for her children.
- She lives with her in-laws. They will not let her live by herself, even though she would prefer to.
- The family makes a living as subsistence farmers. She spends most of her days in the field or fetching water. It takes four hours everyday to fetch water.
- She is not aware that her country’s policies mean that she is eligible for land and housing grants.
- She has thought about going into business, but she has no collateral with which to secure a loan. Also, she has been told that, without a husband, she cannot apply for a loan.
- She was bright at school. She dropped out of secondary school when she got pregnant with her first child at the age of 16. Now, she would like to continue her education, but there are no possibilities for adult education in her area.
Annex 1

Handout 3: Tools for gender analysis (To be used in Part 2, Activity 10)

Tool 1: Analysis of women’s and men’s gender roles (who does what?)

Purpose of the tool:

It provides information on:

- The productive, reproductive and community activities of the population of a particular community
- The gender division of labour by sex and age throughout the year.

The detail required depends on the nature of a particular project. The project should outline in detail those areas where it will be directly involved. Again, depending on the context, other areas that can be analysed include:

- Time allocation – specifying what percentage of time is allocated to each activity and whether it is seasonal or daily
- Activity locus – specifying where the activity is being performed, i.e. in the home, in the family, field or outside the community
- The perceived values of each activity.

An analysis of who does what in a community provides information essential to the planning of interventions in any one category of work. Changes in any one category will likely affect the activities performed in the other two. Activities performed in the other two areas will likely influence the ability of people (especially women) to participate in, and benefit from, planned changes in the targeted area of work.
Using the tool:

1. Explain the purpose of the tool.

2. Explain to the group that work can be divided into three main categories:
   - Productive
   - Reproductive
   - Community

3. Work with the group to develop a model for gathering information about people’s activities in the three categories of work, relative to the particular characteristics and needs of the project and the population concerned (see an example of a basic model that follows).

4. Once the group has drafted a model, divide the participants into small groups by sex (groups of 4-6). Within each small group, participants discuss and come to a consensus, based on their experience and knowledge of the community, on women’s and men’s activities within the three categories of work.

5. Bring everyone back together and get the small groups to share their information, which is then compiled.

6. Lead a discussion of the possible implications of the data, paying special attention to the triple role of women (if applicable) and its impact on women’s subordination and on women’s ability to take on additional tasks to improve their condition and/or position.

(Adapted from Moser, C. Gender Planning and Development: Theory, Practice and Training.)
### Basic model for gathering information about people’s activities

<table>
<thead>
<tr>
<th>Activities</th>
<th>Sex &amp; Age</th>
<th>Months of the year</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Productive activities (examples)</strong></td>
<td></td>
<td>J F M A M J J A S O N D</td>
</tr>
<tr>
<td>Animal care</td>
<td></td>
<td></td>
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<tr>
<td>Farming</td>
<td></td>
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<tr>
<td>Income-generating</td>
<td></td>
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<tr>
<td>Employment</td>
<td></td>
<td></td>
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<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Reproductive activities (examples)</strong></td>
<td></td>
<td></td>
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<tr>
<td>Childcare</td>
<td></td>
<td></td>
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<tr>
<td>Food preparation</td>
<td></td>
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<tr>
<td>Water-related</td>
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<tr>
<td>Fuel-related</td>
<td></td>
<td></td>
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<tr>
<td>Health-related</td>
<td></td>
<td></td>
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<tr>
<td>Market-related</td>
<td></td>
<td></td>
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<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Community activities (examples)</strong></td>
<td></td>
<td></td>
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<tr>
<td>Community politics</td>
<td></td>
<td></td>
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<tr>
<td>Community managing</td>
<td></td>
<td></td>
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<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

_W = women, w = girls, M = men, m = boys_
Tool 2: Constraints and Opportunities Profile

Purpose of the tool:

This tool identifies the factors that influence the division of labour, access to and control over resources, opportunities and benefits, and how these factors affect their ability to participate, contribute and benefit from the development process.

It facilitates identification of the causes of gender inequalities and the factors/development trends that would provide opportunities for the promotion of gender equality in the future. It identifies present and past influences as well as indications of shifts in trends.

Using the tool:

1. Explain the purpose of the tool to the participants.
2. Divide the participants into groups of 5.
3. Ask the participants in each group to choose a facilitator and a reporter.
4. Provide groups with flipcharts and marker pens.
5. Ask the groups to undertake an environment scan of the social, economic, political and technological context and to identify the factors that influence the gender differences between men and women in relation to HIV and AIDS. Identify which are constraints for men and which are for women. Ask participants to explain how they are constraints to the effectiveness and sustainability of strategies to combat HIV/AIDS. Ask them to identify trends that provide opportunities for the promotion of gender equality and reduction of women’s vulnerability to HIV and AIDS.
6. Allocate 45 minutes for these discussions.
7. Ask the groups to report in plenary.
8. In plenary, facilitate discussions and consensus building around key constraints and opportunities, such as gender issues in HIV and AIDS.

<table>
<thead>
<tr>
<th>Constraints and Opportunities Profile (Influencing Factors)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
</tr>
<tr>
<td>Economic</td>
</tr>
<tr>
<td>Culture and custom</td>
</tr>
<tr>
<td>Values and norms</td>
</tr>
<tr>
<td>Political events</td>
</tr>
<tr>
<td>Legislation</td>
</tr>
<tr>
<td>Institutional arrangements</td>
</tr>
</tbody>
</table>
**Tool 3: Analysis of practical and strategic gender needs**

**Purpose of the tool:**

Projects that focus only on women’s access to resources without considering their lack of control over those resources may respond to short-term practical needs, while reinforcing traditional roles and responsibilities and women’s subordinate status. Raising community awareness of the imbalances of control over resources can empower marginalised groups to participate in decision-making to meet some of their long-term strategic needs.

The purpose of this tool is to distinguish between the short-term practical needs and long-term strategic needs of a marginalised population. This tool can be used to:

- Assess the degree to which an existing project addresses the practical and strategic needs of a group
- To indicate what the project needs to do to address the population’s practical and strategic needs. This should be done in the project design process. The instructions below will address both uses.

**Using the tool:**

To assess the degree to which an existing project addresses practical and strategic gender needs:

1. Review with the group the difference between short-term practical needs and long-term strategic needs/interests.

2. Ask the group to share examples of what (poor) women in their communities need to improve their lives on a daily basis (= short-term practical needs). Examples: family food provision, access to fuel, housing, health care, provision of clean water, improved sanitation etc.

3. Discuss with the group the characteristics of these needs. They tend to:
   - Be related to daily needs
   - Be easily identifiable
   - Be based on the concrete conditions in which a particular population lives and on a gender-based division of labour
   - Not challenge the subordinate position of women although they arise out of it.
4. Ask the group to share examples of what (poor) women in their communities need to improve their position in the long term (= long-term strategic needs). Examples: educational opportunities, measures against male violence and control over women, ending gender-based divisions of labour, access to and control over resources necessary for their basic needs, removal of institutional forms of discrimination such as rights to own land or property, access to credit, equity in wages, freedom of choice over child bearing, self-esteem, participation in local processes etc.

Discuss with the group the characteristics of these needs. They tend to:

• Be long-term
• Be common to almost all people
• Be particularly prevalent and problematic among marginalised populations (i.e. poor women)
• Challenge the nature of the relationship between men and women
• Aim to overcome women’s subordinate status or position.

5. Divide participants into small groups of 4-6. Ask each group to select one project and use it to discuss the following questions and to note their responses:

• What practical needs of women and men does this project address?
• What strategic needs of women and/or men (the identified marginal group) does this project address?
• What changes in the project would address better the needs of the marginal group? Back together, each small group shares their responses to the questions and develops a single list of practical and strategic needs of women and men that can be addressed by a project.

6. Divide participants into small groups of 4-6, if possible by sector (for project personnel). Give each group a set of marker pens and flipchart paper. Ask the groups to do the following activity:

• In the middle of the paper, draw a picture of a woman from the ‘target population’ whose needs the proposed project intends to address
• Close to the picture, draw a balloon and note in it one major problem affecting women in the target population
• Identify one or more problems resulting from the first problem. For each linked problem, draw a new balloon and link it to the first one
7. Lead a group discussion based on the following questions:

- What have you learned from this activity?
- What problems will the planned interventions address? Do they represent practical or strategic needs or both?
- What needs are being left out? Are these practical or strategic needs?
- Are there other interventions the organisation could add that would address more of women’s strategic gender needs?
- What is the impact of the way practical gender needs are met on meeting strategic gender needs?
- In what ways can women be encouraged to participate in the project, given their subordinate position within the community?

(Adapted from Canadian Council for International Co-Operation, *Two Halves Make a Whole.*)

<table>
<thead>
<tr>
<th>Gender Needs</th>
<th>Women</th>
<th>Men</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Practical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Strategic</td>
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<td></td>
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</tbody>
</table>
Tool 4: Assessment of access to and control over resources and benefits

Purpose of the tool:

The tool identifies:

- The resources people use to do their work, and whether women or men have access to, and control over, these resources
- Who controls the benefits of the use of household and community resources.

Access means one uses the resource; control means one is able to make decisions about its use.

Being able to distinguish between access to and control over resources and benefits enables people to assess the relative power of members of a community, society or economy.

This important tool reveals women’s and men’s capacity to influence development at a local level. The tool also exposes women’s vulnerability to resource constraints in their efforts to overcome poverty and reveals their capacities to contribute and benefit from development.

Using the tool:

1. Work with the group to identify the resources used to do the tasks described under the three categories of work (see tool Analysis of Women’s and Men’s Roles) and the benefits people derive from them. Post the flipchart Access and Control Profile, and fill in the resources and benefits as participants list them.

   - Resources may include: land, equipment, labour, tools, cash/credit, skills, education/training, self-esteem, time etc.

   - Benefits may include: income, asset ownership, provision of basic needs, education, political power, prestige, status, etc.

2. Divide the participants into small groups by sex.

3. Ask the groups to fill out the profile, indicating:

   - Their perceptions of the degree to which they feel women and men have access to, and control over, each type of resource
   - The degree to which they feel women and men benefit from the use of these resources (on a scale of 1 to 10, which is then translated into percentages).
4. Bring everyone back together and combine the data from the small groups by averaging the figures to form a group representation.

5. Lead a discussion of the reasons for the differences and what the group would like to see happen (for example, 100% access and control in all categories for women and men alike), using the following questions to guide the discussion:

Resources:

- What resources do women, and men, have access to?
- What resources do women, and men, have control over?
- What are the implications of this information for the project?
- How can the project help to increase a marginalised group’s access and control?

Benefits:

- What benefits do women, and men, receive from the work?
- Over which benefits do they each have control?
- What are the implications for project activities?
- How can marginalised groups increase their access and control over benefits?

(Adapted from Canadian Council for International Co-operation, Two Halves Make a Whole.)
### Tool 5: Access and Control Profile
(To be used with: Assessment of Access to, and Control Over, Resources and Benefits)

<table>
<thead>
<tr>
<th></th>
<th>Access</th>
<th></th>
<th>Control</th>
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<tbody>
<tr>
<td></td>
<td>Women</td>
<td>Men</td>
<td>Women</td>
<td>Men</td>
</tr>
<tr>
<td><strong>Resources (examples)</strong></td>
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<tr>
<td>Land</td>
<td></td>
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<td>Equipment</td>
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<td>Labour</td>
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<td>Tools</td>
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<tr>
<td>Cash</td>
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<tr>
<td>Credit</td>
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<tr>
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Tool 6: Gender Analysis Matrix (GAM)

Purpose of the tool:

- To facilitate community discussion about the impact of development projects on men and women, households and the community with regard to labour, time, resources and culture
- To test and raise awareness of how a project functions in relation to gender roles and responsibilities.

(GAM is best done in a community group with equal representation of men and women. Initially, a development worker familiar with the tool should facilitate it.)

Using the tool:

1. Introduce the purpose of the tool
2. Post the flipchart and the Gender Analysis Matrix (sample follows) and review it with the group, defining terms as necessary.
   - **Women**: women of all ages who are in the target group (if the target group includes women) or all women in the community
   - **Men**: men of all ages who are in the target group (if the target group includes men) or all men in the community
   - **Household**: all men, women and children residing together, even if they are not part of one nuclear family
   - **Community**: everyone within the project area as a whole (if a clearly defined ‘community’ is not meaningful in the context of the project, omit this level of analysis)
   - **Labour**: changes in tasks, level of skill required and labour capacity (how many people and how much they can do)
   - **Time**: changes in amount of time it takes to carry out the task associated with the project or activity
   - **Resources**: changes in access to capital (income, land, credit) as a result of the project and the extent of control over changes in resources for each level of analysis
   - **Cultural factors**: changes in social aspects of the participants’ lives (in gender roles or status) as a result of the project.
3. Work with the group to fill in each level, assessing project impact on each category shown.

4. After all of the boxes have been filled in with potential changes that the project might bring, the group should assign a ‘+’ sign to those potential effects that are consistent with programme goals and a ‘-’ sign to those that are contrary to programme goals. If the group is uncertain of the desirability of an outcome, a ‘?’ may be assigned.

5. The analysis should be reviewed and revised periodically (once a month for the first three months and once every three months thereafter).

6. Repetition of the matrix exercise allows participants to reflect on and change assumptions as the project progresses. This approach to consciousness-raising bases an understanding about gender roles on the experiences of community members rather than on externally generated perceptions.

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<th>Labour</th>
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<td>Community</td>
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(Adapted from Parker, R. Another Point of View: A Manual on Gender Analysis Training for Grassroots Workers.)
Annex 2*

Handout 4: Checklist for gender analysis of the project cycle

1. Situation analysis

1.1 Development trends

- What are the positive and negative development trends of concern to the project?
  - How do they affect women’s and men’s activities?
  - How do they affect women’s and men’s access to and control over resources and benefits?

- How do the women and men respond to the identified trends (both positive and negative)? For example:
  - What are the opportunities and/or constraints the gender division of labour presents to the women and men?
  - What are the opportunities and/or constraints that their resource access and control profiles present to the women and men?

- For the women, and men, what practical and strategic gender needs arise in respect of the identified opportunities and constraints?

- How do the women and men prioritise the identified practical and strategic gender needs?

1.2 Gender division of labour

- What livelihood activities do women do, and which ones do men do?
  - Where are the activities carried out?
  - When are the activities carried out?
  - How often are the activities carried out?

- For women, and for men, what major constraints arise from the gender division of labour (GDOL)?

• For women, and for men, how do these constraints affect:
  - Their ability to take advantage of opportunities presented by the development trends?
  - Their ability to overcome the constraints presented by the development trends?

• For women and for men:
  - What opportunities does the GDOL present for joining the proposed project?
  - What constraints does the GDOL present for joining the proposed project?
  - Which aspects of the GDOL would the proposed project have to address to facilitate women’s (and men’s) participation?

In the proposed project, what roles are expected of women and men?

What impact will these roles make in the GDOL? For example, will the gender inequalities in the GDOL increase? Decrease? Or remain the same?

### 1.3 Access to and control over resources and benefits

• What resources do women and men need for carrying out their gender roles?

• What resources do women and men actually have for carrying out their gender roles?

• What resources do women and men control?

• How do the gender gaps in resources access and control profiles affect women’s and men’s abilities to:
  - Take advantage of opportunities presented by the development trends?
  - Overcome the constraints presented by the development trends?

• **For women, and for men:**
  - What opportunities do their access to resources and control profiles present for joining the proposed project?
  - What constraints do their access to resources and control profiles present for joining the proposed project?
• Which resources will the proposed project provide specifically for women’s and men’s roles?

• What will be the impact of project inputs on women’s, men’s, access to and control over resources and benefits? For example, will the gender inequalities in access to and control over resources increase? Decrease? Or remain the same?

1.4 Practical and strategic gender needs

• What practical and strategic gender needs arise for women and for men as a result of:
  - Prevailing development trends?
  - Prevailing GDOL?
  - Prevailing gender gaps in access to and control over resources?

• Which of the women’s, and men’s, practical gender needs will the proposed project address? In what ways?

• Which of the women’s and men’s, strategic gender needs will the proposed project address? In what ways?

• What is the likelihood of project intervention being sustainable in respect of:
  - Practical gender needs?
  - Strategic gender needs?

1.5 Policy environment

• Is there a National Gender Policy? If so:
  - How does it define the ‘national problem’ that it addresses?
  - What are the policy’s goals, objectives, targets and strategies?
  - How does the policy relate to the problem addressed by the proposed project?
• Is there an **explicit policy on the problem area** addressed by the project? If so:
  - What is the guiding principle of the policy?
  - Is the principle gender-sensitive?
  - How does the policy statement define the problem?
  - Is there explicit attention to gender aspects of the problem?
  - What are the policy’s goals and objectives?
  - Are there gender-specific goals and objectives?
  - Are there gender-specific strategies stipulated by the policy?
  - Does the policy specify women as part of the target groups?
  - To what extent are gender concerns addressed in:
    - Policy administration procedures?
    - Administrative machinery?
    - Policy implementation strategies?

• Is there an **international convention** that addresses the problem area of concern to the project?
  - Has Government signed the convention?
  - Compared to the national policy on the problem area, is there:
    - Consistency, compatibility and complimentarity between the two?
    - Conflicts and contradictions?
  - Have there ever been projects addressing the problem of concern to the present proposed project? If so:
    - Over the years, which gender issues were addressed by these projects in terms of their:
      - Problem statements?
      - Development goals?
      - Development objectives?
      - Operational strategies?
      - Identification of the target group?
      - Project administrative structure?

• How will the proposed project improve on gender issues?
1.6 Problem statement

- What is the problem of concern to the project?
- Relative to other issues, how is the problem ranked by the affected women (and men)?
- How is the problem linked or related to:
  - Identified development trends?
  - What are women and men to do (GDOL)?
  - Women and men’s resources access and control profiles?
- For women and for men, what PGNs (Practical Gender Needs) and SGNs (Strategic Gender Needs) arise from the problem?
- What is the scope is for addressing these needs, in terms of existing policies and programmes?
- What would happen if there were no external interventions?

1.7 Goals and objectives statement

- What are the development goals of the proposed project?
- How do the development goals relate to women’s and men’s, PGNs and SGNs?
- What are the immediate objectives of the proposed project?
- How do the immediate objectives relate to women’s and men’s PGNs and SGNs?
- Is the emphasis of goals and objectives on SGNs or on PGNs?
  - How will such an emphasis affect prospects for sustainability of project activities and benefits for women (and men)?
- To what extent, and how, did the women (and men) participate in defining and prioritising project goals and objectives?
- To what extent, and how, were women’s organisations involved in the formulation of project goals and objectives?
- Overall, are project goals and objectives aimed at:
  - Social transformation? If so, how and why?
  - Economic transformation? If so, how and why?
  - Maintenance of the status quo? If so, how and why?
2. Project selection, justification and design

2.1 Selection criteria

• To what extent, and how, were women (and men) involved in identifying project selection criteria?

• Which were the most important criteria and why? For example:
  - Appropriateness to identified PGNs and SGNs
  - Appropriateness to women’s (and men’s) existing technical skills
  - Appropriateness to women’s (and men’s) literacy and numeracy levels
  - Existing extension services and skills training opportunities
  - Accessibility by women of the existing extension services and training opportunities
  - Market and conditions
  - Environmental factors.

2.2 Justifications

• To what extent, and how, were women (and men) involved in identifying ‘justifications’ for the selected project?

• Which were the most important justifications and why? For example:
  - Compatibility with Government policies
  - Compatibility with existing Government programmes
  - Compatibility with local customs and traditions
  - Potential contribution to community cohesiveness
  - Potential contribution to socio-economic transformation
  - Potential contribution to building self-help capacity.

• If local customs and traditions are given as justifications, what customs and traditions are these? Are they conducive to gender equality in:
  - The division of labour?
  - Access to and control over resources?
  - Access to and participation in political power?
2.3 Institutional Framework

**Funding agency**

- What is the funding agency’s policy on gender?
- What programme/projects does it support to promote gender equality?
- What criteria must a project meet to qualify for the Agency’s support?
- Does the proposed project meet the set criteria?

**Implementing and supporting agencies**

- For each Agency:
  - What is the policy on gender?
  - What gender-specific goals and objectives is it pursuing?
- To what extent has the agency institutionalised gender in its organisational structure, staff recruitment and development and operational procedures? For example:
  - Gender-specific organisational goals, objectives and mission
  - Gender-specific quota system of staffing at all levels
  - Gender-specific duties as part of overall job descriptions
  - Gender training as part of staff development
  - Gender sensitive operational methodologies, for example:
    - Specific targets for the coverage of women and men in the agency’s programmes
    - Inclusion of gender awareness-raising sessions among the target communities and project participants
    - Identifying socio-economic profiles of women and men in the target community
    - Defining development goals and objectives accordingly
    - Special measures to increase the agency’s capacity for outreach to women
    - Gender-sensitive Terms of Reference for consultancy services to the Agency.
Local structure

- What proportions of the decision-making organs (committees and sub-committees) consist of women?
- What proportion of chairpersons consists of women?
- Of the women covered by the proposed project, what proportion will benefit from Organisational and Institutional Development activities? For example:
  - Activities to promote group cohesiveness and decision-making skills
  - Activities to promote skills in leadership, mobilisation, organisation and management
  - Activities to promote skills in networking, lobbying and advocacy
  - Civic education, e.g. how Government structures operate, etc.
  - Education on human rights, especially those of women.

2.4 Target group

- What major factors stratify the target group? (For example, sex, marital status, access to land and other resources, level of control over resources, income levels, etc.)
- Which categories do most women (and men) targeted by the project belong?
- What are the major PGNs and SGNs of the women in each category? (Relate these to GDOL and to Resources Access and Control Profiles)
- What are the criteria for women’s (and men’s) eligibility to join the project?
- Which categories of women (and men) find it difficult to meet the criteria?
- Overall, what are the major cultural constraints on women’s participation in development?
- How does the project propose to overcome cultural constraints?
- What are the proposed proportions of women and men targeted by the project?
- What measures are in place to ensure that these proportions will be met?
2.5 Planned inputs

- What provisions are in place to promote women’s equal participation in the project? For example:
  - Advocacy sessions in the community to promote the principle of gender equality
  - Involving the community in gender analysis of their socio-economic conditions and in setting development goals
  - Women-specific skills training.

- What planned inputs are women-specific?

- What proportion of the project budget is committed to women-specific inputs?

- To what extent will women control project inputs? For example, what proportions of decision-making positions in the project are held by women:
  - In the implementing agency?
  - In the local structure and its committees? (For example, child-care facilities at the project site; literacy activities for women, skills training; credit; etc.)

- What provisions are proposed in respect of the sex composition of the project promoters? How might this affect women’s access to extension services?

- Are gender concerns explicit in the job descriptions and operational procedures of the extension workers?

- What proportion of the project budget is for gender training of the extension workers for their role in the project?

- What proportion of the project budget is for gender awareness-raising and training for the target community for their role in the project?
2.6 Expected outputs

How do the expected outputs relate to the PGNs and SGNs of the women (and men) as identified in the situation analysis?

- How do the expected outputs relate to the inputs? (In other words, are the quantities and or values comparable and compatible?)

- Are the women-specific expected outputs commensurate with women’s expressed PGNs and SGNs?

- Given the levels of inputs, are the targets (if any) for outputs realistic?

- Given women’s PGNs and SGNs, are the targets for women-specific outputs realistic?

- What measures are in place to ensure equality in the distribution of project outputs or benefits? (For example, how will the project help to increase access to and control over project outputs and benefits?)

2.7 Implementation plan and budget

- To what extent are planned activities and assignment of gender responsibilities in the project cognisant of:
  - The existing GDOL?
  - Women’s and men’s resource access and control profiles?

- For the participating women, what is the impact of the project activities on their workload? How does this affect:
  - Project performance?
  - Women’s performance in their other work outside the project?

- Are provisions in place or planned for women-specific appropriate technologies that are time-, labour- and energy-saving?
2.8 Monitoring

- What are the key indicators of project progress?
- What are specific data requirements of these indicators?
- Is the need for sex-disaggregated data understood and specified in the data collection instruments?
- Where/how are the data to be sourced or generated?
- What role will women play in project monitoring? For example:
  - As enumerators?
  - As providers of information?
  - As record-keepers
  - As report writers and presenters?
- What measures will enhance the women’s role in monitoring? For example:
  - Training in record-keeping?
  - Training in simple research methods?
  - Timing research work to suit women’s triple roles?
  - Literacy and numeracy activities for women?
  - Use of female enumerators?
  - Use of participatory techniques of data collection?
- Are methods of data compilation, storage and retrieval appropriate to women’s literacy and numeracy skills?
- Are there provisions to ensure that women participate in evaluating the monitoring data?
3. Project Appraisal

- Is there consistency and goodness of fit between planned gender-specific inputs and gender-specific expected outputs?

- Is the project likely to produce expected results? For example, in terms of gender-specific goals and objectives?

- Is the selected project and its technical and technological requirements appropriate to the target groups’ and women’s technical skills and literacy levels?

- Is there agreement between expressed PGNs and SGNs and the chosen project strategies?

- Is there gender equality in:
  - Assignment responsibilities in the project?
  - Access to and control over project resources and benefits?

- What aspects of the implementation strategy may be detrimental to women’s participation in the project?

- Would benefits from the project be adequate to justify the increase in women’s workload?

- Would project outputs and benefits be adequate to justify the inputs into the project?

- Overall is the project design likely to:
  - Promote socio-economic transformation?
  - Resurface the status quo in GDOL and in resources access and control profiles?

- What are the prospects for sustainability of project activities and benefits?
4. Implementation and monitoring

4.1 Activity monitoring

- Did activities start and make progress as planned?
- How are women's and men's other gender roles affecting progress?
- How are women's and men's productivity in other activities affected by the project activities?
- How are women's and men's resource access and control profiles affecting progress?
- How is the project affecting the availability of resources for other, non-project activities of the women and men?

4.2 Inputs delivery monitoring

- Is the timing of project inputs delivery appropriate in view of women's and men’s other non-project activities?
- Are the delivered inputs appropriate in view of women's and men’s reported resource constraints/needs?
- In view of the expected women-specific project outputs, are inputs for the women-specific activities available in sufficient quantities?
- Where own resources (e.g. financial and/or labour contributions) are required, how does this affect the level of women's participation in the project? Which category of women is mostly negatively affected?
- What is the average time lag between requests for inputs and delivery of promised inputs? In the case of long delays, what are the main reasons for this?
- How would project activities be affected by the timing of inputs delivery?
- What aspects of extension services would promote or hinder effective outreach to women? For example:
  - Sex of the extension worker
  - Age of the extension worker
  - Timing of extension service
  - Venues of meetings
  - Method of extension services, etc.
4.3 Outputs monitoring

- Which outputs relate to women’s and men’s PGNs?
- Which outputs relate to women’s and men’s SGNs?
- Are the expected outputs adequately provided for in terms of planned inputs?
- What measures are there to ensure gender equality in access to and control over project outputs?
- To what extent do women, and men, feel they would be directly responsible for the project outputs?
- What are the expected impacts of the project outputs on the gender inequalities in women’s and men’s resources access and control profiles?

5. Evaluation

5.1 Relevance

- Are the project outcomes compatible with:
  - The expressed PGNs of the women and men?
  - The expressed SGNs of the women and men?

5.2 Effectiveness

- Are the project’s objectives and targets being met, especially in relation to gender-specific outputs?

5.3 Efficiency

- Do the project outputs and outcomes justify the costs in project inputs? For example, are increases in women’s workload adequately justified by the level of benefits to the women?

5.4 Sustainability

- Is project emphasis on meeting PGNs or SNGs of women and men?
  - Given that emphasis, what are the prospects for local support and sustainability of the project activities and benefits?
5.5 Gender equality

• Is the project emphasis on socio-economic transformation towards gender equality, or on maintaining the status quo? For example, what are the likely impacts of the project on:
  - The gender division of labour?
  - Gender inequalities in resources access and control profiles?
  - Inequalities in gender relations of power?

• What were the major women-specific, and men-specific, factors promoting and/or hindering the progress of the project?
Annex 3

The following sets of questions are the key ones for identifying women’s dimensions in each of the four main stages in the project cycle: identification, design, implementation, evaluation.

Situational analysis and project identification

Assessing women’s needs

- What needs and opportunities exist for increasing women’s productivity and/or production?
- What needs and opportunities exist for increasing women’s access to and control of resources?
- What needs and opportunities exist for increasing women’s access to and control of benefits?
- How do these needs and opportunities relate to the country’s other general and sectoral development needs and opportunities?
- Have women been consulted directly in identifying such needs and opportunities?

Project design

A  Defining general project objectives

- Are the project objectives explicitly related to women’s needs?
- Do these objectives adequately reflect women’s needs?
- Have women participated in setting those objectives?

B  Project impact on women’s activities

- Which of these activities (production, reproduction and maintenance, socio-political) does the project affect?
- Is the planned component consistent with the current gender denomination for the activity?
- If it plans to change the women’s performance of that activity, is this feasible and what positive or negative effects would it have on women?
- If it does not change it, is this a missed opportunity for women’s roles in the development process?
• If it plans to change the activity locus of that activity, is this feasible, and what positive or negative effects would it have on women?
• If this does not change it, is this a missed opportunity for women’s role in the development process?
• If it plans to change the remunerative mode of that activity, is this feasible, and what positive or negative effects would it have on women?
• If it does not change it, is this a missed opportunity for women’s role in the development process?
• If it plans to change the technology mode of that activity, is this feasible, and what positive or negative effects would it have on women?
• If it does not change it, is this a missed opportunity for women’s role in the development process?
• How can the project design be adjusted to increase the above-mentioned positive effects, and reduce or eliminate the negative ones?

C Project impact on women’s access and control

• How will each of the project components affect women’s access to and control of the resources and benefits engaged in and stemming from the production of goods and services?
• How will each of the project components affect women’s access to and control of the resources and benefits engaged in and stemming from the reproduction and maintenance of the human resources?
• How will each of the project components affect women’s access to and control of the resources and benefits engaged in and stemming from socio-political functions?
• How can the project design be adjusted to increase women’s access to and control of resources and benefits?
Project implementation

A Personnel

• Are the project personnel sufficiently aware of and sympathetic toward women’s needs?
• Do females deliver the goods or services to women beneficiaries?
• Do personnel have the necessary skills to provide any special inputs required by women?
• Are there appropriate opportunities for female participation in project management positions?

B Organisational structures

• Does the organisational form enhance women’s access to resources?
• Does the organisation have adequate power to obtain resources needed by women from other organisations?
• Does the organisation have the institutional capability to support and protect women during the change process?

C Operations and logistics

• Are the organisation’s delivery channels accessible to women in terms of personnel, location and timing?
• Do control procedures exist to ensure dependable delivery of goods and services?
• Are there mechanisms to ensure males do not usurp the project resources or benefits?

D Finances

• Do funding mechanisms exist to ensure programme continuity? And afterwards?
• Are funding levels adequate for the proposed tasks?
• Is preferential access to resources by males avoided?
• Is it possible to trace allocation to delivery for women with a fair degree of accuracy?
E Flexibility

- Does the project have a management information system that will allow it to detect the effects of the operation on women?
- Does the organisation have enough flexibility to adapt its structure and operations to meet the changing or new-found situations of women?

**Women’s dimension in project evaluation**

A Data requirements

- Does the project’s monitoring and evaluation system explicitly measure the project’s effects on women?
- Does it also collect data to update the Activity Analysis and the Women’s Access and Control Analysis?
- Are women involved in designating the data requirements?

B Data collection and analysis

- Is data collected with sufficient frequency so that necessary project adjustments could be made during the project?
- Is the data fed back to project personnel and beneficiaries in an understandable form and on a timely basis to allow project adjustments?
- Are women involved in the collection and interpretation of data?
- Is data analysed in order to provide guidance to the design of other projects?