5. INSTITUTIONALIZING THE GENDER APPROACH

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5.1. Objectives

The objective of this module is to bring to the attention of the participants the very practical steps that must be taken if a ‘gender approach’ is to be introduced into normal working procedures.

At the end of the module they will be aware of a number of immediate measures that should be taken to assist the institutionalization of the gender approach, and of the difficulties involved in these. They will have considered this in the context of their own home working situation.

They will have an appreciation of the possibilities for training and the different ways in which this may be approached.

5.2. Scheduling

It is expected that the module should be covered in a half day session. There is more than enough material for a half day, so the trainer has some flexibility in selecting which parts to emphasise, particularly which exercises to devote most time to.

The module consists of a lecture, which may be copied for the participants, to be followed by discussion on a number of suggested points in a plenary session.

This is followed by a short film, about which there may also be some discussion.

Two exercises are provided: the first involves designing a training programme for the participant's own organization, and the second concerns locating the gender expertise within the participant's own organization. All materials relating to the exercises, including the case study, should be copied for the participants.

All the necessary materials, including the video, are included in the package.

5.3. Lecture

If a gender approach is to be adopted in energy planning, this does not mean setting up a few special projects to try to benefit women. On the contrary, it means that all projects should be viewed through ‘the gender specs’ (see diagram). It means that gender analytic tools and procedures need to be integrated into the regular pattern of work as carried out by the organization. Thus the attention given to gender (or to ‘women’) is not special but a normal planning task institutionalised into the routine of office activity. Just as it is increasingly common these days to carry out an environmental impact analysis of any proposed project, so it should be standard practice to carry out a gender analysis in addition. While this does of course entail an increase in the workload of the planners concerned, the chances are that the effectiveness of wood energy projects will be greatly increased if proper attention is given to gender matters. Therefore in the long run, time (and money) will be saved.
The gender-environment 'bifocals' for professionals

However, as we all know, bureaucracies are often slow or even unwilling to make changes in procedures and a number of deliberate steps must be taken to prepare the way for the adoption of the gender approach.

Ensure that there is Visible Support from the Top

In order to ensure that staff do respond and adopt gender analytic procedures, it is essential that a policy directive is promulgated which is clear and definite about what the policy is. Such a policy statement should state not only the organization's policy on gender in general, but also the strategy, i.e. how it intends to ensure that a gender sensitive approach is followed. The policy statement may be rather specific about the procedures which it expects staff to follow in this regard. The policy statement should also indicate the commitment of policy to the gender issue by indicating that staff will be evaluated and promoted on the basis of their implementation of the gender approach (as well as on other criteria). The policy directive should be distributed and discussed throughout the organization.

Select and Design the Gender Analytical Procedures and Prepare a Manual

A standard analytical and reporting approach such as the Harvard Framework, or a standard checklist, can be used; alternatively, an adaptation of such an approach, designed to fit the specialised work of the organization concerned can be made. Mostly, agencies such as energy planning ministries may find it better to create their own standard approach following general guidelines of the Harvard sort. The manual should cover the gender component in all aspects of planning including project formulation, appraisal, implementation, monitoring and evaluation. Whatever methods are used must be clearly defined and their use explained in a short manual which should be distributed to all departments together with the policy directive on gender. Obviously such methods should be subject to criticism and revision in time, as experience in using them develops. Where staff experience difficulty in applying the stated methods, it should be clear to them to whom they should turn to for advice, and to whom they can make suggestions regarding the appropriateness of the methods.
Decide Upon an Appropriate Structure and Location for Gender Expertise Within the Organization

A basic question the organization must ask itself is: can we cope with the gender approach with existing staff, by training, or do we need some additional specialised staff?

Let it first be said that training of the existing staff is essential whether or not new specialised staff are recruited. Failure to train existing staff will result in misunderstanding, resentment and outright rejection by them of work done by the new specialised staff. However, the increased workload incurred by the gender analytical procedures may justify the hiring of additional, specialised, staff in the case of large organizations. There may be a minimum requirement of a (new) gender specialist to organize training for staff internally (see below).

Assuming that new staff need to be recruited, the question then becomes, should a special gender unit be set up within the organisation, or should larger units within the organization have a gender specialist attached directly to them? Both models here advantages and disadvantages. There is a danger that a special, separate gender unit may generate conflict and be marginalised within the organization; on the other hand, if it is well managed, it might have sufficient resources to build up a good documentation centre and form a focal point for extending the gender debate within the organization. In comparison, the distribution of a handful of gender experts over the whole organisation would probably lead to fewer situations of conflict, but gender matters may be less visible and have a tendency to be addressed less frequently. Much depends on the existing culture of the organization concerned and its normal working procedures: if it is quite normal that inter-departmental committees exist and if they are effective in other areas, then a 'spread-out' model of gender expertise might be the most effective. In a more 'top-down' type of organization in which directives are generally issued from above without much discussion, then perhaps a separate gender unit is more appropriate. In smaller organizations such a NGOs the matter does not really arise as internal communication is generally much easier.

Even if the budget does not extend to the employment of additional ‘gender’ staff it is wise in a technical team to ensure that some social scientists are present: if they are already in place, then it may be possible to place the main responsibility for the implementation of the gender approach in their job descriptions (but, as noted already, do not neglect to train the technical team members too: they will not accept advice from the social scientists if they do not see the point of it or understand it). It is not essential that such staff be female, but as there are far more female graduates in social sciences than in technical fields, there is a good chance that they will be. If the ‘gender specialist’ is indeed a woman, it is important that a man on the staff (technical or non-technical) should be made co-responsible for gender, since it is important that the whole gender issue is not seen just a ‘women’s business’. The tendency to revert to the notion that gender is about women, and therefore that only women need be concerned about it, is one that has constantly to be combated in organizations. If the gender issue is seen as such by the majority of (male) staff members, there is a large probability that it will be marginalised.

Institute an On-Going Training Programme

Large organizations such as international donor agencies may have permanent gender experts employed solely to train their own staff. In smaller organizations this is of course not possible, and the choice is to hire in temporary staff to carry out training intermittently, or to allocate the training responsibility to an existing member of staff in addition to his/her existing tasks. It is however
important that all staff at policy and implementation levels receive some training. And training should not be considered a ‘one-off’ exercise: it may be necessary to repeat training sessions or design more advanced ones for some or all staff, as the need arises.

Training should relate as directly as possible to the work of the staff concerned. It should therefore be based on the concrete gender procedures adopted by the organization, and illustrated with exercises and discussion on projects or programmes which the organization is actually involved in. Early preparation of an in-house manual on standard procedures to be used will obviously assist in focusing training on the reality of staff work. However, experience shows that gender training, even when it addresses procedural matters and the manner of carrying out routine analytical tasks, often overflows into much more general discussion and learning as regards gender in society. Since gender training is in essence not just skills based, but also attitude based, it is very important that sufficient time is allowed in the training sessions for discussion and critique.

The ideal group size for training is 12–15 persons but training programmes can vary from half a day to two weeks in length. It is possible to train each unit within the organization separately (which has the advantage that training case studies can be used which are directly relevant to the work of that unit), but mixing staff from different units is also interesting. Whether staff of greatly differing rank are included in the same workshops will depend on the level of communication that is to be expected if this is done. It is essential that all participants in the training workshops feel able to express their opinions, and if the presence of senior staff suppresses the ability of junior staff to speak out, it is more sensible to provide training by level.

The ideal trainers would be a team of one man and one woman; this combination has been shown time and time again to be very fruitful, indicating to participants that gender is not just about women. Although the basic training materials may be standard, care should be taken that the case studies or examples used are as close to the normal work experience of the participants as possible. Case studies which the participants have to analyze themselves, using the standard procedures adopted by the organization, are without question the most effective way of learning.

From the experiences of major donor organizations with gender training for their own staff, fourteen important lessons can be drawn, which are briefly summarized below¹:

1. There must be an explicit mandate for gender training from the top of the organization. This mandate must be clearly communicated to all departments within the organization. It must be clear that gender training is for the entire organization and not only for the gender office(r). A broad range of people has to be trained to ensure that addressing gender issues becomes a normal part of the organization's operations. Directors and administrators must attend the training: they need to learn the language of gender issues and at the same time, make a statement by their presence that gender training is indeed important to the organization as a whole.

2. Training can serve as an effective mechanism to integrate gender perspectives and gender analysis into the operations of an organization. However, training is a process and requires sufficient time to achieve full impacts.

¹ For a full report on gender training within donor organizations, see FAO (1990).
3. Gender training must be managed and backstopped by strong, qualified professionals within the organization.

4. Someone from within the organization needs to have full-time responsibility for training (Training Coordinator).

5. Training is more effective and efficient when the same team or at least a core group of the same team conducts the training over the initial training period during which gender analysis is being introduced to the organization.

6. Training of trainers is a critical element for achieving long-term integration of gender issues and analysis in an organization.

7. Every training course needs preparation time.

8. Training must be financed, and a training programme’s funding must be comprehensive.

9. Trainers require adequate resources and support personnel.

10. The case method approach is particularly well-suited to training in gender analysis because it avoids lecturing to participants, actively engages participants in learning as individuals and in collective groups and provides realistic examples in relation to gender analysis in development efforts.

11. It may not be necessary to develop new case studies in order to begin training in gender analysis. Existing gender case studies can be used in initial training activities.

12. Selection of participants is crucial to the success of a training course or programme.

13. It is essential to provide participants with an analytical framework for gender issues and analysis. This framework is not a checklist or a recipe, but a tool that enables critical diagnosis and analysis leading to better project design and implementation.

14. There is no single training strategy that will fit all organizations: each organization needs to diagnose its own internal situation in order to design an effective training strategy that will successfully facilitate the process of integrating gender analysis into the organization, and overcoming the resistance towards addressing gender issues.

**Keep a List of Available Gender Consultants and Rewrite Standard Terms of Reference**

Whether for training or for carrying out specialised tasks, it is important that the organization maintains links with a number of gender consultants who can be called upon occasionally. These may be persons acting in an individual capacity or as part of an institution such as a university.

In addition, it would be wise to review the standard guidelines used by the organization both for hiring consultants and for bringing in regular staff. Most guidelines are biased in favour of male candidates; they may need to be rewritten. An example is attached.
Establish a Special Fund

If possible establish a special fund or vote to cover gender related activities such as small seminars, visits of specialists, sending staff to occasional training outside the organization, purchase of books etc.

Network

Network with other organizations that are attempting to bring in a gender-sensitive approach to planning. Make sure that there are lines of communication to important gender groups such as the Ministry of Women's Affairs, major women's NGOs and other technical ministries.

Monitor and Evaluate Progress

Monitor and evaluate the progress made in implementing a gender sensitive planning approach within the organization and be prepared to make adaptations when necessary.
Annex 1: Discussion Questions

1. Which of the gender tools which have been discussed so far in the workshop are most suitable to the kind of work which your department does?

2. Would the best strategy for your organization be a central gender unit or specialised gender staff spread out in every subsection? Why?

3. How can you ensure that someone who devotes him/herself to gender aspect of planning does not get left behind in terms of career and promotion?

4. What opportunities do you see for networking with other organizations on gender planning? What other organizations do you know of that may already be involved in this? Have you had any regular contact with them up to now on matters other than gender?

Notes for Trainers

Because participants are being asked to consider the questions in relation to their own circumstances, there are no uniform answers to the questions posed in the exercises for this module.

Depending on the size of the workshop, the discussion points following the lecture can probably be posed by the trainer to the plenary session. The exercises based on the film and based on the case study should be done in pairs or possibly in groups of three. The aim of the trainer is simply to allow each participant to think through the situation in his own organization and draw his/her own conclusions. This can be stimulated if the participants are grouped in such a way that they represent distinct organization types. NGO staff should probably be in different groups from ministry staff: country groups of ministry staff should assure some uniformity of experience.

Following discussion in these small groups (15 to 20 minutes for each of the two exercises), each should be asked to present their findings briefly. The trainer should actively seek clarification during these presentations, always asking the ‘why’ questions (why have you decided on a separate gender unit rather than dispersed gender personnel, why do you think it better to hire in gender trainers rather than train your own staff as trainers, etc). This should result in identification of a number of common concerns from the different groups, to which attention should be drawn.
Annex 2: Exercise: Design a Training Programme

Five Key Issues in Gender Training are Considered Below

1. The level of organizational commitment. Strong institutional commitment for addressing gender issues in general is a very critical factor in determining whether or not training will be successful. As mentioned earlier, the existence of a gender policy alone is not enough to ensure its implementation within an organization. Commitment to addressing gender issues must also be manifested by the strength of the actual unit empowered to promote gender-sensitive activities.

2. The length and format of the training activities. The length of a training activity depends on the professional level of the participants to be trained, participants' expertise, time available for training, financial resources, availability of trainers, and the material and skills to be covered. Each organization must determine what is appropriate for its needs; there is no one correct strategy for training. The effectiveness of training depends on the approach that is adopted: an experiential teaching process brings about better results. When attitudinal change is involved, participants should be engaged in a participatory process and take responsibility for their own learning. Training should thus move away from an academic style of teaching and take a more experiential format.

3. The trainers. Since addressing gender issues often meets with strong resistance and participants frequently demonstrate such resistance, it is very important that the trainers introducing the concepts are very skilled and experienced in this sort of training. It is not wise to engage an unexperienced trainer because this can lead to a poor outcome which can jeopardize subsequent training efforts. Criteria for selection include: language, vocabulary, regional and subject matter experience. Furthermore, training seems to be more effective when the training team includes both male and female trainers.

4. The training methods and materials. The training materials and methods must be relevant to the work or activities of the participants. The case method, as an experiential mode of training that actively engages participants in the subject matter, has been a particularly successful training tool for many institutions (World Bank, USAID). The case studies available today fall into two categories: (1) the project case which aims at describing how a project is designed and implemented in order to examine it for gender implications and (2) the research case which provides details and data on the results of research and extension events, not on project design elements.

5. The training of the trainers. Although many organizations give considerable emphasis to the importance of training of trainers, few provide explicit details on how they do it. There are extensive materials and resources available on generic training of trainers and facilitators, although few deal specifically with gender training.

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1 Feldstein, H. & S. Poats, Gender and Agriculture, Volume I: Case Studies, Volume II: Teaching Notes, Kumarian Press
Task

Develop a gender training programme for your own organization using five key issues as starting points: (1) level of organizational commitment, (2) length and format of the training, (3) trainers, (4) training methods and material and (5) training of trainers.

1. Consider the overall gender training needs of your organization: how many people from which different subsections would need training? How would you group them?

2. Can you identify individuals within the organization who could act as gender trainers if they themselves were to receive some training first?

3. What kinds of resources would be necessary to run such gender workshops in your organization and what is the probability that such resources could be made available?
Annex 3: Case Study

ALTERNATIVE STRUCTURES FOR GENDER EXPERTISE IN AN ORGANIZATION


Oxfam is one of Britain’s biggest development NGOs with a staff of more than 1000. In 1985 it established a gender unit (Gender and Development Unit, GADU) emphasising the importance of gender specialists. This action was taken after being proposed by a group of women field officers. Initially it was intended as a short term measure and a means to get gender ‘onto the agenda’. A decisive force behind GADU was the newly appointed director of Oxfam, who strongly supported the field.

This was not to be the only specialist unit within Oxfam: there were already specialist units dealing with research and evaluation, for example, so there was some precedent. The function of these specialist units within the overall structure of Oxfam is advisory, not mainline.

GADU started work by responding to field requests for advice and funding of projects from its own staff. This was followed by the promotion of the employment of gender project officers to do project work in the field, and more recently by the endorsement of the need for regional offices to develop a gender policy. Networking was identified as a means to influence the attitudes and working practices of the headquarters staff working in Oxford. Training of these staff was not a priority.

Christian Aid, another, but rather smaller UK development NGO, had an internal Women’s Group already which drew up a set of organizational recommendations in 1983, which recognised the constraints and blockages to women in development. This group developed into a Women’s Forum in 1987 and wrote more recommendations. As in Oxfam, it was a ‘back-bencher’, or bottom-up staff movement within the organization.

The recommendations of the Women’s Group were picked up by another group within the organization concerned with the Aid sector, which recognised that gender issues were not being adequately dealt with in project documents. Thus the Women’s Group found sympathizers and support among a broad base of colleagues, which was rather different from the Oxfam case. Unlike Oxfam, Christian Aid has neither field offices nor specialised units at headquarters, and from the start it prioritised training of all staff responsible for project funding decisions. It saw this as a long term effort towards mainstreaming women’s issues in development and institutionalised it through the hiring of three gender-aware generalists and a trainer. All four were involved in training in practice. Planning procedures were changed with redesigned checklists for projects and gender guidelines, which were introduced through training.
At Oxfam, GADU is able to act both as a monitoring unit to ensure integration and as a pressure group to ensure that women's issues remain on the agenda. They have been able to produce a number of policy documents on the subject of gender for example, and they argue that the existence of a separate unit was essential to give room for this kind of development.

However, it has not been easy. A considerable amount of conflict has been generated and a large number of complaints has been made. There are many other professionals in the organization who do not regard the unit as central, and at least in the beginning regarded the individual (female) staff of the unit as trouble makers and blamed them for creating conflict within the organization. Today this view of the unit has become generally less acceptable. Now the problem is that people pretend to agree with the unit although in reality they do not.

At Christian Aid, where the mainstream approach was taken in preference to the ‘separate’ approach, there has certainly been much less conflict over gender matters. The difficulty is to identify who is actually responsible for gender, since everyone passes the buck. The generalists employed to do the gender training have greatly resisted attempts to make them ‘the gender unit’, since the responsibility is supposed to lie with each and every department. There has been much less activity in developing policy and in networking on gender issues with other NGOs and governments agencies.

Exercise Based on the Case Study

The case study illustrates two different structures for introducing gender issues into planning. Two NGOs have chosen different strategies. List the advantages and disadvantages of a central gender unit compared to ‘diffuse’ gender expertise throughout the organization. Which model do you think is best suited to your own organization and why?