

INTRODUCTION

Inputs not leading to impacts?

The last two decades (1985-2005) have seen an improvement in Indian women and girls' condition, but very little changes in their position vis-à-vis men and boys. Female literacy has improved, and so has women's access to drinking water, electricity, and sanitation. However, Indian girls' enrollment is lower than that of boys at secondary and tertiary levels, Indian women continue to own little property (be it house or land), female labour force participation in India continues to be significantly lower than that of males, Indian women earn much less than men, gender based violence against Indian women and girls persists, while Indian women are numerically present (33%) in local governance they exercise little political decision making, and women have little rights over their reproduction and sexuality. While heterosexual men's position is better than that of women within any given class or community, the position of males and inter sex population marginalised by their sexual or gender identities is as bad as that of women. The position of dalit men, Adivasi men and Muslim men outside the household may be worse than that of women from privileged caste groups.

It is ironical that the same two decades have seen considerable progress in official (government, donor and NGOs') discourse on women's development. While in the 1980s and 1990s the discourse was one of integrating women in development through women specific anti-poverty programmes, micro-credit programmes making use of women's efficiency, and equal opportunity legislation, the 2001 National Policy on Empowerment of Women emphasises the need for women's empowerment



to challenge the socially constructed (gender) power relations between men and women. It speaks specifically about strengthening Indian women's and girls' position vis-à-vis men and boys (Government of India, 2001). Gender focal points have been established in several social sector departments. Several Ministries have a gender policy. Gender specific guidelines have been evolved for integrating gender into planning, and gender indicators for monitoring do exist. Gender budgeting exercise has been undertaken by the Indian government at the national level with the support of UN bodies. The government has undertaken an effort to train programme staff at all levels on gender. New guidelines on sexual harassment at the work place and legislation on Domestic Violence Act have been passed. National Commission on Women has come into being, though with limited powers (Center for Reproductive Rights, 2004).

Indian NGOs have also attempted to set up the basic *infrastructure* for institutionalising gender into policy and programmes during the last two decades following similar strategies to those adopted by the government (term 'infrastructure' used by Rao and Kelleher, 2003 to refer to systems and procedures). In addition they have attempted to put in place the infrastructure for institutionalising gender in the structure and human resource systems of NGOs- like setting quotas for women in Boards and leadership positions, following affirmative recruitment and promotion strategies, integrating gender into job descriptions and performance evaluation etc. A few Indian NGOs have moved beyond the infrastructure approach to institutionalising gender, and adopted the '*organisation*

change' approach where the emphasis is on changing the 'masculine' decision making and organisation culture of NGOs through making the organisation more democratic, promoting flexible working time and space which accommodates women staffs' reproductive roles, increasing voice of women staff in decision making, increasing accountability to women clients and building alliances with leaders of women's movement to create demand for organisational change from outside (term organisational change approach used by Rao and Kelleher, 2003).

Several of these gains in institutionalising gender have been possible because of *windows of opportunities* thrown up by the Fourth World Conference on Women (1995), International Conference on Population and Development, in Cairo (1994) and Vienna Declaration on Violence Against Women (1993), and *informal mobilising structures* through alliances between the Indian women's movement, gender advocates in donors, politicians and bureaucrats, and gender advocates among NGOs (Burton and Pollack, 2002).

Thus a key question is why in spite of efforts to make use of windows of opportunities and mobilising structures to put in place 'gender infrastructure' in development organisations (government and NGOs) and bringing about gender aware 'organisation change' (a few NGOs) have few gains been achieved in terms of position of women and men marginalised due to their social sexual or gender identity? That is, why have inputs in institutionalising gender within development organisations not led to reduction in gender inequalities on the ground (impact)? Yes, part of the problem, is that government departments and most NGOs have not sought to institutionalise gender within the organisation culture (organisational change approach). But more important are two important gaps in present efforts to institutionalise gender within development organisations, which are discussed below.

- First, is the problem of weak and neo-liberal 'conceptual frames' on gender within which some of the efforts to institutionalise gender in development organisations in India operate. The shifts in thinking on gender amongst feminist circles, are yet to percolate down to efforts to institutionalise gender within development organisations in India. Further, at times the radical concept of gender as power relations has been co-opted by neo liberal institutions to promote gender-neutral institutionalisation, that is, institutionalisation which makes use of gender analysis for other ends like economic growth (adapted from Kabeer, 1994) .
- Second, the 'strategic frames' adopted to institutionalising gender within development organisations in India has been limited to an 'integrationist' approach viz. add 'gender infrastructure' within existing objectives of development organisations and mix (Jahan, 1995). They have not challenged the norms of household, markets, community, state, and neo-liberal inter-state institutions (e.g. World Bank, USAID) which have kept women and girls in a marginalised position (in particular those from labouring class, dalits, minorities, etc.), as well as men marginalised by their sexual, gender and other social identities. Even in the few instances wherein an effort has been made to bring about gender aware change in organisation culture, at times this has become a goal in itself, and the ultimate objective of bringing changes in societal institutions has got lost (Rao and Kelleher, 2003).



Weak and neo-liberal gender conceptual frames

In the late 1970s when the Subordination of Women group, bringing together feminists from across the globe, met in UK they observed that the problem in women's subordination was not the women themselves (that they were illiterate or lacked skills), but the socially constructed power relations between men and women (referred to as gender relations). These relations were seen as interlocking with power relations of caste, class, race, age, religion, ethnicity etc. to maintain women in a subordinate position (Whitehead, 1979). In the early 1990s, Kabeer (1994) further extended this conceptualisation by pointing out that the gendered power relations were reproduced through different institutions of society, namely household, community, markets, and the state. Murthy and Rao (1997) added inter-state institutions (organisational forms include World Bank, IMF, WTO and UN) to this list of institutions, with the term neo-liberal inter-state institutions in particular referring to the first three. These institutions, Kabeer and Murthy and Rao argued, were governed by norms and ideologies which led to allocation of power and resources and day to day practices which discriminated against women and other marginalised groups.

Cornwall (1998), through her documentation of gender at work at the community level, challenged the notion that gendered power relations were played out only in the relation between women and men. She posited that the social construction of gender has a strong role to play in some of the power relations *between* women and *between* men, and these power relations, in turn, keep women and girls, as well as men who are sexual minorities, dalits, labouring class, religious minorities and differentially abled, in a subordinate position etc. The socially constructed relations between mothers and adolescent daughters, mothers-in-law and daughters-in-law (reverse when old), women with husbands and single women, women with sons and women without, upper caste women and dalit women are cases in point of power relations between South Asian women. Similarly, the relations between men who are sexual majorities and those who are

sexual minorities, fathers and sons, upper-caste men and dalit men/muslim men etc. are examples of power relations between men. Power relations between women and between men have as much role to play as power relations between women and men in persistence of arranged (same caste) marriages, the practice of dowry, restrictions on adolescent girls mobility and higher education, restrictions on men helping women in domestic work etc.

In the 1990s, there was a growing interest in the concept of masculinities which refers to ways of being men and boys, as well the ideology of privileging men and boys over women and girls (IDS Bulletin, 2000). The ideology of dominant masculinities is carried by both men/boys and women/girls, and leads to not only women's and girls subordination, but also leads to disadvantaging men who do not adhere to these dominant norms. Gender, masculinities and development has emerged as an area of enquiry internationally and within India in the 2000s (<http://www.southasianmasculinities.org>). Related, there has been a re-conceptualisation of the binary concept of sex and gender. Increasingly, it is recognised that by birth one can be born a male, female, or inter-sex, and one can grow into men, women or LGBT (Lesbian, Gay, Bisexual and Transgender).

The efforts to institutionalise gender in development organisations, in particular, the bureaucracy, have been guided by conceptual frames that have overlooked this deepening of thinking. Gender relations are at best seen as power relations between men and women, and at worst have been co-opted within neo-liberal paradigms, where it is emphasised that gender differences (note, not gendered power relations) have to be taken into account for economic growth, poverty reduction and development effectiveness (World Bank, 2002). The fact that in addition to power relations between women and men, gendered power relations between women, between men, also have a role to play in maintaining women's and marginalised men's subordinate position, is ignored.

Inadequate frames for institutionalising gender in development organisations

The term gender mainstreaming became popular Fourth World Conference on Women. However, it holds different meaning for different organisation. According to the UN Economic and Social Council, gender mainstreaming is

The action of assessing the implications for women and men of any planned action, including legislation, policies and programmes, in all areas and at all levels. It is a strategy for making women's as well as men's concerns and experiences an integral dimension of the planning, monitoring and evaluation of policies and programmes in all political, economic and social spheres so that women and men benefit equally and inequality is not perpetuated. The ultimate goal is to achieve gender equality (UN, 1997, p28).

While this definition sees gender mainstreaming as a strategy for making women's *as well as* men's gender concerns an integral dimension of planning, monitoring, and evaluation, the definition adopted by the Association for Women's Rights in Development (AWID) sees gender mainstreaming primarily as a strategy to promote women's rights. According to AWID gender mainstreaming is:

A strategy that promotes gender equality and promotes women's rights by infusing gender analysis, gender sensitive research, women's perspectives and gender equality goals into policies, programmes and institutions. (AWID, 2004: p1)

This manual prefers to use the term 'institutionalising' gender within development organisations to the term 'mainstreaming' gender, as the term mainstreaming gender signifies that the 'mainstream' is all right, and what is required is to integrate gender within it. The mainstream promotes neo-liberal perspectives on development (economic growth as the goal), and

neo-liberal strategies to development (market led development), while this manual strongly believes that the state is primarily responsible for promoting human development and protecting human rights of all citizens (including women), as well as for ensuring equity between women and men, and between different groups of women and different groups of men.

In the context of India, where gender, caste, class, age, religious, sexual orientation and other hierarchies are strong, the focus of the manual is not in aiding institutionalising of gender concerns of women and all men, but of women and men marginalised by their sexual, gender and other identities (discussed above). The tilt is, in fact, more towards institutionalisation of women's rights.

In India, the frame adopted by intervening agencies- donors, training NGOs, gender focal points- to institutionalise gender within development organisations has often been guided by the 'infrastructure' approach (in both government organisations and NGOs) and at times by the 'organisational change' approach (only in the context of NGOs). Some donors have attempted to change organisational culture of quasi government organisations by recruiting NGO workers and middle level staff into the quasi government organisation (see Murthy et al, 2005). The infrastructure approach has by and large taken the vision, and mission of the organisation as given, and within that sought to institutionalise gender into the base-line data gathering, planning, monitoring and evaluation, and human resource development systems, as well as organisational structure. The mission of government line departments, is often sectorally driven (agriculture, health, education etc.), while NGO missions are either sectorally driven or issue driven (reduction of poverty, reduction of violence against women, furthering reproductive rights, etc.). The vision of NGOs is definitely more ambitious than that of government, and often includes a(n) 'egalitarian society', 'just society', 'equal society' and 'democratic society'.

Why then has the ‘infrastructure approach’ to institutionalising gender failed to promote sustained gender equality on the ground even in the case of NGOs focusing on strategic gender oriented missions, and with radical visions? A key factor is that transformative visions and strategic gender issue oriented missions get converted into ‘programs’ which rarely include strategies to challenge societal institutions, beyond ‘awareness generation’, ‘campaigns’, ‘research’ etc. The sectorally driven NGOs often focus on delivering or piloting innovative services or sectoral community organisations into which gender is integrated. While new assets created through NGO managed resources may be distributed in the names of women, few NGOs have adopted strategies to challenge ownership pattern within households of old or existing assets before the NGO intervention. While NGOs have created women only community organisations (notably, micro credit SHGs) few have brought women into traditional panchayats. While NGOs have at times paid equal wages for work of women and men in their disaster relief programmes, few have managed to institutionalise equal wages in the local labour markets. While NGOs have at times enabled women and marginalised men to make government service providers accountable, rarely have they managed to hold government policy makers accountable.

Some argued that gender infrastructure will not work if organisation cultures are not gender sensitive, and thus began efforts to make internal organisations gender sensitive (see Mukhopadyay et al, 2006). That is, gender inputs at infrastructure level of organisations, were not seen as leading to impacts, because of gender-biased organisational process. However, at times bringing gender aware organisational change became a goal in itself, and did not automatically lead to challenging of institutional norms subordinating women and (marginalised) men. Further, intrinsic within the organisational cultural change approach is the belief that women are ‘biologically’ more gender sensitive than men; a myth challenged by many (Goetz, 2007).

Drawing upon Rao and Kelleher (2003), this manual posits that what is required is an institutional or political approach to institutionalising gender within development organisation. That is, the ultimate goal of institutionalising gender in development organisation must be to foster progressive changes in the gender discriminatory rules, practices, and allocation of resources and power within households, community, markets, state and neo liberal inter-state institutions. Gender infrastructure is required to aid this process, as well as organisational (cultural) change. Organisational change processes must not only strengthen the position of women staff within the organisation, but also respond to new field demands coming out of the process of challenging gender discriminatory institutions. Gender infrastructure and organisational change processes should be accountable to women’s strategic gender interests and marginalised men’s interests. That is, what is required is a combination of institutional, organisational and infrastructural approach to institutionalising gender within organisations; with the latter two supporting a process of institutional change in favour of women and marginalised men.

The manual on Institutionalising Gender within Organisations and Programmes

This manual, the second in the series of manuals produced by Visthar, has been conceptualised to familiarise gender facilitators with ‘conceptual frames’ on gender and ‘strategic frames’ for institutionalising gender within development organisations, so as to bring about changes in societal institutions in favour of women/girls and marginalised men thereby furthering gender and social equity.

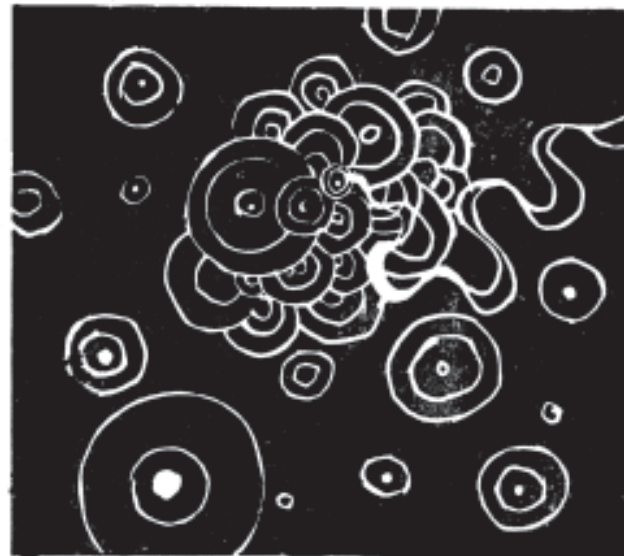
The specific objectives of the manual are to equip facilitators with skills and knowledge to strengthen participants’:

- Understanding of some of the advanced concepts on sex and gender in the context of development.

- Understanding of gender analysis and policy frameworks rooted in a social relations and institutional perspective.
- Understanding of different elements of an organisation, and institutional, infrastructural and organisational change approach to institutionalising gender within organisations.
- Understanding of how to institutionalise gender in the following:
 - Vision, mission and strategy
 - Programme planning
 - Programme monitoring and evaluation
 - Budgeting

Each module consists of one to five sessions. The outline of each session includes:

- Possible objectives of the session
- Alternative training methodologies
- Approximate time required for different methodologies
- Materials required for each methodology
- Hand out on key discussion points
- Annexes on exercises and recording sheets
- List of essential reading for participants and facilitators



An overview of the modules in this manual is given below

Module	Objectives
Module 1 Gender concepts	<ul style="list-style-type: none"> • To introduce concepts of sex and gender, and the changes in thinking on these • To examine how gender relations interlock with other social relations to maintain women (and transgenders) in a subordinate position • To understand the institutional construction of gender relations in India, and in the area where the participants work
Module 2 Gender analysis and policy frameworks	<ul style="list-style-type: none"> • To understand and apply the concepts of gender based: <ul style="list-style-type: none"> - division of labour - access, ownership, and control over resources - participation in decision making • To understand and use the concepts of: <ul style="list-style-type: none"> - human needs and interests - practical gender needs and strategic gender interests • To understand force field and institutional approach to planning for addressing strategic gender interests of women • To understand different policy approaches to gender and women’s development
Module 3 Approaches to engendering an organisation	<ul style="list-style-type: none"> • To understand the elements of an organisation • To have a basic understanding of gender issues in an organisation • To understand the different approaches to engendering an organisation
Module 4 Engendering vision, mission, strategies and programmes	<ul style="list-style-type: none"> • To understand the terms vision, mission, and strategy • To develop skills in institutionalising gender within vision, mission and strategy

Module	Objectives
Module 5 Engendering planning, monitoring and evaluation	<ul style="list-style-type: none"> • To develop skills in evolving a gender sensitive programme plan for one's organisation • To understand the meaning and types of indicators • To understand criteria for and develop skills in developing gender sensitive indicators • To develop skills in using gender and institutional analysis matrix for evaluation • To understand gender issues to be kept in mind during evaluation
Module 6 Engendering organisation structure, culture and leadership	<ul style="list-style-type: none"> • To understand gender issues in organisation structure, leadership and organisation culture • To understand different approaches to engendering the same.
Module 7 Engendering Human Resource Development (HRD) systems	<ul style="list-style-type: none"> • To understand definition and different elements of HRD • To understand gender issues in HRD in the context of NGOs • To develop skills to engender HRD systems and processes • To be familiar with strategies to engender HRD processes of an NGO
Module 8 Engendering budgeting	<ul style="list-style-type: none"> • To understand the need for gender analysis of budgets • To understand steps in analysis of budgets from a gender lens • To develop skills in analysis of NGO budgets from a gender lens • To revise an NGO budget from a gender lens
Module 9 Institutionalising gender within organisation	<ul style="list-style-type: none"> • To become familiar with strategies to institutionalise gender within NGOs, which combine the infrastructural, organisational, and institutional approach • To assess the degree of institutionalisation of gender within their own organisation, and reflect on which strategy could be appropriate for strengthening the process.

How can this manual be used?

The facilitator could use the manual as a whole (requiring approximately 5 days), or only those bits that are relevant to the level of participants, their training needs, and the time that is available.

The facilitator may also decide to ‘adapt’ the module instead of sticking to it word by word. For example, if all the participants are from one state, it may make sense to use case studies from that state, or a state of a similar profile, rather than all the case studies indicated.

Whichever way it is used, it is imperative that the facilitators read the relevant essential readings; as the handouts only introduce the basic issues and are targeted at participants.

Feedback on the manual is welcome, and may be sent to:
mail@visthar.org

Reference:

_____, (November 2004), ‘Gender Mainstreaming: Can it Work for Women’s Rights?’, Spotlight, AWID

Burton and Pollack, (October 2002), ‘Gender Mainstreaming and Global Governance’, Feminist Legal Studies, Volume 10, No.3 and 4.

Cornwall, A., (2000), ‘Making a Difference? Gender and Participatory Development’, Discussion Paper, UK:Institute of Development Studies.

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_____, (April 2000), ‘Men Masculinities and Development, Politics, Policies and Practice’, Volume 31, No. 2, IDS Bulletin

Jahan, R., (1995), *The Elusive Agenda: Mainstreaming Women in Development*, London: Zed Books

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Mukhopadhyay, M.,Steehouwer,G. and F., Wong, (2006), *Politics of the Possible, Gender Mainstreaming and Organisational Change, Experiences from the Field*, Netharlands: Royal Tropical Institute, and UK: Oxfam

Murthy, R.K and Rao, (1997), *Addressing Poverty: Indian NGOs and their Capacity Building in the 1990s*, Friedrich Ebert Stiftung, New Delhi.

Murthy, R.K., K. Raju, A. Kamath, and SAPAP Research Team (2005) ‘Towards Women’s Empowerment: Lessons from the Andhra Pradesh South Asia Poverty Alleviation Programme, in Burra,’ Deshmukh-Ranadive and Murthy (eds.) *Micro Credit, Poverty and Empowerment: Linking the Triad*, New Delhi: SAGE.

Rao and Kelleher, (May 2003), ‘Institutions, Organisations, and Gender Equality in an era of globalization’ in Gender and Development, Volume 11, No. 1.

_____, (2004), *Women of the World: Laws and Policies Affecting their Reproductive Lives*, New York: The Center for Reproductive Rights.

_____, (18 September, 1997), Report of the Economic and Social Council for 1997, A/52/3, United Nations.

Whitehead, Ann, (April, 1979), ‘Some Preliminary Notes on Subordination of Women, Vol. 10, No.3, IDS Bulletin.

_____, (2002), *Integrating Gender into World Bank’s Work, A Strategy for Action*, Washington: The World Bank.



My humanity is bound up in yours,
for we can only be human together.
Desmond Tutu



MODULE 1

GENDER CONCEPTS

Objective

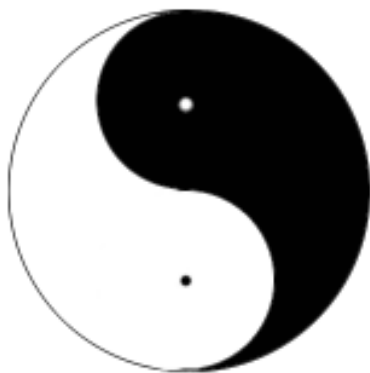
- *To introduce concepts of sex and gender, and the changes in thinking on these*

Materials

- *Two cards marked Male and Female*
- *Recording Sheets 1 and 2*
- *Chart papers*
- *Sketch pens*
- *Hand out 1.1.1 on definitions pertaining to sex and gender*

Time

Two hours



METHODOLOGY

Alternative 1

1. Label two spots in opposite sides of the room as 'Female' and 'Male'
2. Ask the participants "If you have a choice would you like to be born as a male, or female?" Do not give the option of saying 'either'. Ask them to move to the appropriate spot.
3. Request participants in each spot (group) to discuss reasons they chose a particular sex, and to distinguish between the reasons given by men and women.
4. Let each group present their arguments, and if after hearing each others arguments some want to change their preference ask them to do so.
5. Note the number of participants of each gender opting to be male or female after any swappings, and the reasons in Recording Sheet 1.1.1
6. Analyse the roles, qualities and behaviour patters of men and women stemming from the reasons using Recording Sheet 1.1.2
7. Go through each role, behaviour or quality listed and ask participants which of these are due to biological and which due to sociological factors. If there is a difference of opinion in the group, allow them to debate for five minutes.
8. Define the terms gender and sex. Reinforce that gender is dynamic while sexual differences are generally static (Hand out 1.1.1)
9. Facilitate discussion on what happens when women and men deviate from socially expected norms on their roles, qualities and behaviour. Reinforce that deviation by women meets with violence (reflecting power relations), and deviation by men meets with ridicule.

10. Discuss how gender differences in roles, behaviour and qualities lead to differences in access to resources, decision-making, and responsibilities; again pointing to how social differences are linked to issues of power.
11. Ask whether men and women uniformly display the roles, behaviours and qualities described in the list. In what situations do these aspects differ? How do men and women of different ages behave or assume roles with other age groups? How do women and men of different relation positions (mother, father, brother, sister, mother-in-law, and daughter-in-law) relate to women and men of different relation positions?
12. Introduce the more complex definition of gender relations as any power relationship between men and women, and between women and between men where the social construction of gender makes a difference in Handout 1.1.1
13. Ask whether all biological males behave like heterosexual men, and all biological females behave like heterosexual women, and introduce the term LGBT (lesbian, gay, bisexual and transgender). Also clarify that some people are born with ambiguous sexual characteristics based on their genitalia, chromosomes or secondary sexual characteristics (e.g. breasts, body hair). It is hence possible to also think of a range of sexes and not just males and females, some times referred to as inter-sexed persons.
14. Thus moving beyond the binary sex/gender system, one could conceptualise sex as male, female, and a range of sexes, and gender as men, women, and a range of genders



Materials required

- Two cards marked Male and Female
- Recording Sheets 1.1.3
- Chart papers
- Sketch pens
- Hand out 1.1.1 on definitions pertaining to sex and gender

Time

Two Hours



Alternative 2¹

1. Introduce the objectives of the session
2. Discuss with each participant at what age they realised they were boys, girls or LGBT, in which institution, what exactly happened, and how they felt at that time. Record in Recording Sheet 1.1.1.
3. Facilitate a discussion on the key differences between men/boys, women/girls and LGBT persons/inter sexual persons in terms of roles, qualities and behaviour pattern. Use Recording Sheet 1.1.1
4. From then on follow steps 7 to 11 in Alternative 1
5. Share that the training programme will return to the examples of institutions that shape gender relations later.

Essential readings for facilitator

Whitehead, Ann, (April 1979), 'Some Preliminary Notes on Subordination of Women', Vol. 10, No.3, IDS Bulletin.

Cornwall, Andrea, (2000), 'Making a difference? Gender and Participatory Development', Discussion Paper, UK: institute of Development Studies.

_____, (2004), *Beyond the Binary: A tool kit for gender identity activism in schools*, USA: Gay-Straight Network/Tides Center, Transgender Law Center, and National Center for Lesbian Rights.

Fausto-Sterling, Anna, (March/ April 1993), *The Five Sexes: Why Male and Female is Not Enough*, *The Sciences*, P20-24

¹ This method has been adapted from the method developed by Dr. Sundari Ravindran, Achutha Menon Center for Health Science Studies, Trivandrum for introducing the concept of gender.

SEX PREFERENCE EXERCISE

	Reasons for the preference	
	Males (No.) _____	Females (No.) _____
Men participants		
	Reasons for the preference	
	Males (No.) _____	Females (No.) _____
Women participants		

ROLES, QUALITIES AND BEHAVIOUR PATTERNS OF MEN AND WOMEN		
	Men	Women
Roles		
Qualities		
Behaviour patterns		

PERSONAL EXPERIENCES OF REALISING THAT THEY ARE BOYS/GIRLS

Sex	Age	Incident	Their feelings	Institution ¹

¹ Family, kinship, school, neighbourhood community, religious institution etc.

SEX AND GENDER

Some of the thinking on sex and gender within development discourse has changed since the late 1970s, while others have not. These are described in the Table below

Changing thinking on sex and gender

	Sex	Gender
1980s-1990	<ul style="list-style-type: none"> Sex refers to biological differences between males and females.¹ Sexual differences cannot be changed 	<ul style="list-style-type: none"> Gender, at a descriptive level, refers to social differences between men and women. Gender differences are manifested in different roles, qualities and behaviours of women and men in society. Gender, at an analytical level, refers to power relations between men and women.
Post 1990 ²	<ul style="list-style-type: none"> Sex is a continuum based on biological and genetic differences. Male and female are two ends of the continuum but in between is space for a variety of intersexed persons who have unclear or both female and male genitalia and secondary sex characteristics, or chromosomes that are not typically male (XY) or female (XX). Sexual differences can be altered through surgery and hormonal therapy but these are expensive 	<ul style="list-style-type: none"> Gender identity is a combination of one's personal internal recognition of the gender that is one's own, the degree to which that internal recognition conforms or fails to conform to one's biological sex, and how one desires to be recognized by others. It is possible to distinguish between men, women, and LGBT (lesbian, gay, bisexual and transgender)³ people based on gender identities Gender relations refer to power relations between women and men, as well as relationships of power between women, and between men where social construction of gender makes a difference.

¹ See Whitehead, 1979

² See Anne Fausto-Sterling's, 1993, which distinguishes between five sexes: males, females, hermaphrodites (who possess one testis and one ovary), female pseudo-hermaphrodites (who have ovaries, some aspects of male genitalia but lack testis), and male pseudo-hermaphrodites (who have testis and some aspects of female genitalia but lack ovaries)

³ Lesbian refers to biological females with a sexual orientation exclusively towards females, gay refers to biological males with a sexual orientation exclusively towards males, bisexual refers to persons who are attracted to more than one sex, and transgender refers to persons who feel that the gender they were assigned at birth is a false or incomplete description of themselves (the term does not imply any specific sexual orientation).

	Sex	Gender
Not changed	<ul style="list-style-type: none"> • Sexual differences do not vary with race, caste, class, ethnicity and religion. • Sexual differences do not vary with time. • Some of the key sexual differences between males and females are women's ability to give birth, breast feed, menstruate, produce eggs, and men's ability to produce sperm. 	<ul style="list-style-type: none"> • Gender differences vary with race, caste, class, ethnicity, religion, relation position, and age. • Gender differences vary with time. • Gender differences vary across situations. That is the same person may behave differently in different contexts (for example, in family and work place).

Based on:

Whitehead, Ann, (April 1979), 'Some Preliminary Notes on Subordination of Women', Vol. 10, No.3, IDS Bulletin.

Cornwall, Andrea, (2000), 'Making a difference? Gender and Participatory Development', Discussion Paper, UK: Institute of Development Studies.

_____, (2004), *Beyond the Binary: A tool kit for gender identity activism in schools*, USA: Gay-Straight Network/Tides Center, Transgender Law Center, and National Center for Lesbian Rights.

Fausto-Sterling, Anna, (March/April 1993), *The Five Sexes: Why Male and Female is Not Enough*, *The Sciences*, P20-24.



SOCIAL RELATIONS, INSTITUTIONS AND CONSTRUCTION OF GENDER

Objectives

- To examine how gender relations interlock with other social relations to maintain women (and intersexed/LGBT persons) in a subordinate position
- To understand the institutional construction of gender relations in India, and in the area where the participants work

Materials

- Four square cards of different colours
- Five round cards of different colours
- 1-2 large twine balls
- Nagavalli case study 1.2.1
- Questions for discussion on institutions 1.2.1
- Recording Sheet 1.2.1 for output from role play
- Handout 1.2.1 on social relations, institutions and construction of gender

Time

Three hours

METHODOLOGY

Alternative 1¹

1. Before the session begins draw an inner circle, and an outer circle.
2. In the inner circle, put five markers that are equidistant from each other, and call them sex, gender, class, caste and religious identity. You may like to add ethnicity or sexual orientation if necessary.
3. In the outer circle put five markers, one each for the institutions of household, community (including religion), state, markets, and inter state (e.g. WTO) institutions.
4. Request the participants to stand in the outer circle. Ask the participants what they understand by the terms class, caste, religious identity, sex and gender (recapturing), and add any inputs if necessary.
6. Read out the case study on Nagavalli. Stop at appropriate points of the story, throw the twine ball to a participant, and ask why a particular incident in the story is happening the way it is. Is women's biology responsible (sex) or a particular social relation? If so, which one? Ask the participant to stand in the appropriate spot in the inner circle.
7. Explore whether any other social relation is responsible for the same incident. If yes, the first participant should hold the twine and throw the ball to the participant who feels that another social relation is also responsible.
8. Continue with the same method, stopping at different points of the case study, till there is clarity on how gender and other social relations interlock to keep women in a subordinate position. Do not wait for the case study to end, but half way through the case study move to step 9.

¹ Adapted from Ravindran, S (1983), *Subverting Patriarchy: Workshops for Rural Women*, Chengalpattu, RUWSEC.



9. Stop at appropriate stages of the case study, get the ball thrown to the quieter participants, and ask which institution is responsible for the incident in the story. Request the participants to move to the appropriate spot in the outer circle. If there are differences of opinion, and both views are valid, two people could be asked to occupy different markers or spots.
10. Ask the participants what they learnt from the game. Reinforce that a woman's life is shaped by the interlocking of gender with other social relations (relations of power) like caste, class, age, race, religious identity, and sexual orientation. These relationships in turn are shaped by the institutions of households, markets (including private media), community (including religion), state (including executive, legislative and judiciary), and inter-state institutions.
11. Explore the topic of institutions more in depth by asking the participants what they think are the components of an institution. See Handout 1.2.1.
12. Divide the participants into five or more groups (the participants may like to look at education, media and markets separately, religion than community institutions as a whole) and ask them to discuss the gender related rules, resources, members and distribution of power in these institutions; and whether this varies with caste, class, urban/rural location etc. Distribute questions for group discussion on institutions (Question set 1.2.1).
13. Ask the participants to make their presentation in the form of a role-play. Record institutional membership, rules, structure and resources in Recording Sheet 1.1.1. If some aspects of institutions are left out, it could be added. Sum up by saying that though all institutions have an official or projected positive ideology, in reality the institutions discriminate against women.
14. Distribute Handout 1.2.1 on Social relations, institutions and construction of gender in India.

Materials

- *Five case studies of women/transgender persons from different socio economic backgrounds (Case studies 1.2.1, 1.2.3, 1.2.4 and 1.2.5)*
- *Questions for group discussion on social relations and institutions: Question set 1.2.1*
- *Recording Sheet 1.2.2 for output from group discussion*
- *Hand out 1.2.1 on social relations, institutions and construction of gender*

Time

Three hours



Alternative 2

1. Ask the participants what they understand by the terms class, caste, ethnicity, sex, differential ability, and gender, intersexed persons, and LGBTs. Add any inputs if necessary.
2. Explore participants' understanding of the term institution, and cull out different institutions of society from the participants: household, market, community, state and inter-state, and its four aspects (point 12, Alternative 1).
3. Divide the participants into five groups, and give them each a different case study describing the life of a woman (one dalit, one tribal, one muslim, one fishing community) or a transgender and her/his interactions in work place, community institutions and with government and ask each group to analyse questions in 1.2.2 and record it in Recording Sheet 1.2.1.
4. Cull out from the group presentations:
 - That a dalit woman's life, and the life of the woman from the fishing community are shaped by the interlocking of gender with caste, class, and age but in different ways.
 - That the inter-linkages between gender, class, and ethnicity shape an adivasi woman's life and that the interlocking of gender with religious identity, class and age shapes a muslim woman's life.
 - That lives of transgender cum homosexual persons are shaped by their gender and sexual identities which are different from what is assigned to them based on birth, and these again interlock with caste, class, religion, and ethnicity. Transgenders from dalit, minority, adivasi, and working class background particularly occupy a subordinate position.
 - The institutions of households, markets (e.g. labour market, MNCs) community (e.g. jamat, caste panchayts, extremist organisations), state (e.g. army, family courts, police), shape the above social relations and women's and transgenders' lives.

5. Elicit comments on how inter-state organisations may have a bearing on the lives of women and transgendered persons, examined in the case studies.
6. Sum up by saying that though all institutions have an official or projected positive ideology, in reality the institutions discriminate against women.
7. Distribute Handout 1.2.1 on Social relations, institutions and construction of gender in India.

Essential reading for facilitator

Kabeer, Naila, (1994), 'Gender Aware Policy and Planning: A Social Relations Perspective' in Macdonald, M (ed.) *Gender Planning in Development Agencies: Meeting the Challenges*, Oxford: Oxfam.



NAGAVALLI'S STORY

Forty-five year old Nagavalli, a Dalit, is the leader of a self-help group (SHG) in Krishna district of Andhra Pradesh. She has three children, two girls and one boy, and her mother-in-law (a widow) resides with them. A year back Nagavalli took a loan from a commercial bank, through her SHG for purchase of two milch animals. Nagavalli, (till recently) her mother-in-law and her children look after the milch animals jointly, with milking and grazing the animals being Nagavalli's responsibility. Nagavalli first sells the milk to her neighbours, and her husband sells whatever is then left to hotels in a small town nearby. Some hotels however do not accept milk from him because he is a dalit. The household earns a profit of roughly Rs 150-600 per month. Till recently her mother-in-law managed the money from the sale of milk. As of late she has not been well, Nagavalli has started managing the proceeds from the sale of milk; but has to give money to her husband for personal expenses like purchase of *beedis* and occasional consumption of alcohol.

Her husband Medappa is a construction labourer. The number of days he gets work has come down from 200 days a year to around 100 as a lot of mechanised equipments have replaced manual construction work. He earns Rs 70 per day. Six months back Nagavalli and other landless dalit SHG members mobilised two acres of land each on their names through a government programme. The scheme entailed distribution of *porombokku* (common) land exclusively for dalits. The land was given on joint name of her husband and self, as per the new government rule on titles for land-distribution. Her husband has taken a loan for irrigation from a commercial bank. He carries out land preparation and ploughing, and undertakes all external activities like purchase of inputs and marketing of produce. Nagavalli does the weeding and transplanting of paddy, and looks after the vegetable crops. While the paddy crop was very good this year, they needed the produce for consumption. The produce met consumption needs of the family for seven months a year. Though the vegetable crop was

also good, they could not make much profit (they however recovered costs, and also costs of inputs for paddy), as the prices of tomatoes slumped, due to excess produce in the markets. Neither did they have access to cold storage facilities to sell later. They barely scrapped through the installment on the irrigation loan. Nagavalli also worked as an agricultural labourer for 60 days this year on others' fields at Rs 40 per day. She would have got more number of days of work if she was also allowed to do post harvest processing inside the 'upper' caste house compound. She retains some degree of control over the income, but has to give money to her husband when he demands it.

On the whole, the living conditions of the household members have improved only slightly after Nagavalli joined the SHG, purchased livestock and after their engagement in irrigated agriculture. The expected income increase through agriculture has not occurred, though food security has improved. The livestock income, has just offset the reduced income of Medappa from construction work. Nagavalli now plays a greater role in earning income for the household, and Medappa less. Nagavalli is however happy that she has the backing of group members, in the event of her husband getting drunk and, occasionally, beating her up. Such incidences have reduced a little bit. She is also happy that her bargaining power vis-à-vis her mother-in-law has improved.

Nagavalli's husband and her children (irrespective of sex) are more privileged with respect to their access to food and milk when compared to herself and her aged mother-in-law. She believes that her husband does more "hard" work when compared to herself, and after all he is the head of the household. Though her household's living conditions have improved, she is worried about whether they will face hardships in the future as she has more daughters than sons, and will have to give at least Rs 40,000 as dowry, apart from jewels to get them married to somebody of the same

economic and social status. She does not want her daughters to face the same situation as herself. She had to get married to a landless widower (Medappa's first wife passed away during delivery, as well as the child) as she was the third daughter and her parents (who were by then landless labourers) could not afford to pay a handsome dowry. Though Nagavalli has acquired land on her name, she intends to pass it on to her sons as per the traditions in her community. After all, she believes, they will look after her.

She is relieved that her relationship with her husband and mother-in-law, though very strained in the beginning of her marriage, has improved over the years. According to her, she would literally be on the streets otherwise. As per the local custom all assets acquired after marriage went to the husband's household upon any separation, unless she had brought it as part of her dowry and it was still intact.

Notes for the facilitator who uses the web game

While initiating the web game, the facilitator may (after reading the first eight lines) like to throw the ball to a participant and ask, "Why does Nagavalli sell milk only to her neighbours, but her husband alone is responsible for selling to outside markets? Is it a gender issue, caste issue, class issue or related to sexual differences". Depending on the choice, the participant moves to the appropriate spot in the inner circle. The ball can then be thrown to another participant by the first participant, while continuing to hold the twine. One could then ask why only some hotels accept milk from the husband while others do not? And so on, till a web is created in the inner circle. After it is clear as to how gender, caste, and class relations affect a woman's life, then move to institutions, and ask what are the institutions in society, and which institution is responsible for the next incident in the story. For example one could ask, "If Nagavalli's husband (Medappa) is getting lesser jobs than before machines came into the area, which institution is responsible?". Encourage to participants who have not answered so far to talk. If there are differences of opinion, and two or more views are valid, two participants could occupy different spots in the outer circle. For example,

one participant may say that the 'construction market' is responsible for Medappa's loss of work, another participant may say that the 'state' is responsible for importing construction machinery from outside, others may say 'inter-state' organisations like the World Trade Organisation is responsible as they are pressing for free trade of goods, services and finance.



STORY OF PRIYANKA, FISHING COMMUNITY¹

Priyanka of Devaneri is 14 years old and she has been living with her mother and two younger brothers, the youngest being three and a half years old, and the middle one being twelve years. Her father Shiva was a fisherman from *Meenavar* community (traditional fishing community). While he went to sea for fishing, he had a paralytic attack and fell into the sea. He was drowned to death. The income of the father was the only support for the family, when he died the family went into a crisis.

Due to the socio-cultural restrictions on widows coming out of their homes for three months after expiry of their husbands, her mother Ragini could not earn a living vending fish. Due to the economic situation of the family, the family decided to stop the schooling of Priyanka, and send the middle brother to work in the sea. Priyanka was asked to look after her youngest brother and do household chores, till her mother recovered from the shock.

In six months time, the mother started vending fish which her brother and son caught (he used her husband's boat). Priyanka continued doing the housework and cooking. As Ragini did not want to travel far and sell fish in the nearest town (she would have then returned at 8 P.M), she sold fish in the neighbouring villages. She would have earned more if she could have traveled to the town. One day, she was harassed by a drunken married man in another village, saying, "You are alone, why do you not let me look after you?". In the context of such harassment, the family members decided that her mother will stop vending fish and Priyanka will go and work in a garment export company, where mainly adolescent girls worked. After a few months, her mother resumed fish vending, as she had to accumulate dowry to marry off her daughter, and the earnings from the factory were far from adequate for this purpose. Both mother and daughter took care

of the household chores before going to work and after returning. They normally fed the youngest son, (who now started going to school) and then ate themselves. The middle son, ate whenever convenient to him.

Priyanka, by now 17 years, fell in love with her dalit christian supervisor Edwin (21 years) who had studied in a missionary school. They wanted to get married to each other. Both families refused to agree for a wedding. Priyanka's because Edwin was a dalit, and Edwin's because Priyanka was a hindu. The Devaneri caste panchayat came to know about the relationship, and was all set to fight with the dalit hamlet where Edwin lived.

Notes for the facilitator

Ensure that the participants analysing casestudy 1.2.2 focus on the institutions of household, work place (fish market, factory), community(traditional panchayats) and state(government school).



¹ This case study was developed by one of the authors for the Save the Children Non Discrimination Workshop held for its staff in Chennai on 25th October, 2006.

STORY OF FATIMA, A MUSLIM WOMAN

Fatima is a muslim woman from a lower middle class family in Kerala. Her parents, who were tailors (with her mother helping her father who was perceived to be the main worker), got her married to a driver working in Dubai from a village in an adjacent taluk. As she was the only daughter, they wanted her to be well settled; and paid a handsome dowry (which was a new custom in the community). The husband used to go to Dubai every two years, then spend six months at home, and again go on a contract. She had just delivered a baby a year after marriage, when her mother-in-law died out of uterine cancer. Her husband came for the funeral and returned to Dubai. Since his wife's death, her father-in-law had been eying her in a sexual manner. One day he cornered her, and raped her. Though she shouted for help nobody came to her rescue. She went and complained to the Jamat of the village. The Jamat called her husband from Dubai and dissolved Fatima's marriage with him, and asked Fatima to marry her father-in-law. She was against this, and approached the women's group in the village (in which she was not allowed to become a member) to help out. They in turn took up the matter with the local NGO that had initiated the sangam, which in turn took up the case with the State Commission for Women. In the meantime, the father-in-law said that Fatima had tried to seduce him, and not the other way around. Her husband refused to have anything to do with her. And her parents would not take her back. The State Commission for Women insisted that justice be meted to her. The Jamat leaders said that the issue should be taken up by the Minority Commission, as there were no muslim women in the State Commission and it was bent on giving a wrong impression about men in the community.



Notes for the facilitator

Ensure that the participants analyzing this case study focus on the institutions of household (here a joint family), community (jamat), markets (labour market), state (the State Commission for women, Minority commission) and the organisations indicated in parentheses.

STORY OF INA, AN ADIVASI GIRL

Mai is a tribal woman from a North Eastern State. Mai and her daughter, Ina, work in a tea estate owned by a company from a state in the mainland. They get paid below the minimum wages for pluckers. Her husband passed away a few years back, while her high school educated son- Sian- is unemployed. The NELF (North East Liberation Front) has been asking them to give their son for conscription for a paltry sum of Rs 5000, but the mother refused, and neither was the son interested. Mai lives in perpetual fear of her son being abducted. One day the army entered the village, and came to know that the NELF cadre had visited Mai's house twice in the last three months. They took Sian for questioning. They did not believe him when he told the truth that the NELF had asked him to join, but he had refused, and he did not know the whereabouts of NELF leaders. Believing that he was not telling the truth, they thrashed him badly. Hearing of this the NELF came again three days later and offered financial support, in return for their son. The family again refused. In the evening when Ina was returning from work, their cadres kidnapped and raped her. The police would not register the case, as they believed that the case was fabricated to prove that the family had no links with NELF. Fed up with life and humiliated by his inability to protect his sister, Sian took to consumption of drugs.



Notes for the facilitator

Ensure that the participants analyzing the case study 2.4 focus on the institutions of household (here a nuclear family), community (NELF), state (army), market (labour market, tea estates)

STORY OF AURJUN, TRANSGENDER AND HOMOSEXUAL

Aurjun was born into a (lower middle class) blacksmith family in rural West Bengal. He had one older brother, and one younger sister. Unlike his older brother who liked to play football with boys, from a young age he liked to play with dolls or skip with girls. As he grew into a teenager, he liked to dress in secret in saris and salwar kamiz, and put on jewels. One day he was caught by his older brother while trying to dress up in these clothes, and he was thrashed by him and his parents. At school, as well, he was constantly teased, as he spent time with girls. Unlike the other boys, he was attracted to well built boys, and not girls. When he shared this in confidence with a girl he considered his friend, the whole school came to know. Not being able to bear the tension at home and school, he ran away to the town of Siliguri and worked in a tea shop. One day a person from the tourist town of Darjeeling approached him promising a better paying job in a fancy hotel. Instead he was introduced to a man who ran a clandestine operation of supplying 'passive' boys to foreign and Indian men who liked to have penetrative sex with such boys (and were considered 'active'). The money was not bad, but at times he had to service 4-6 men and not all agreed to use lubricants or condom. One of his middle class Indian clients- Amang- was very handsome and kind, and promised to take him away and look after him. But Amang was already married (forced by his parents), and loved his child; and was worried about what would happen to his child if he came to know. At 22 Aurjun was losing weight, and went to a doctor in the Siliguri district hospital, who after tests, told him that he was HIV positive. The doctor advised him to go to Calcutta for treatment, which was far away and where he knew people.

Notes for the facilitator

Ensure that the participants analyzing the case study focus on the institutions of household and marriage, state (government school, government health sector, and markets (sex tourism))



ANALYSIS OF CASE STUDIES

1. List the social relations that have a bearing on the life of the women/transgender person in the case study.
2. How do these different relations (including gender) affect the women/transgender person concerned? Give examples.
3. List the institutions/organisations that shape the lives of the women/transgender person in the case study. Is the impact of the institution positive or negative?
4. Analyse these institutions/organisations.
 - Who is included and who is excluded from the institution?
 - What are the rules of the institution pertaining to women/girls, men/boys and transgender?
 - How are resources allocated within or by the institution to women/girls, men/boys, and transgender?
 - Who occupies positions of power- women, men or transgender- within these institutions?
 - Do the membership, other rules, resource allocation in, and structure of the institution vary depending on the caste, class, age, and religious identity of women, men, and transgender? Give reasons for your response.



ANALYSIS OF SOCIAL RELATIONS

Output from role play and large group discussion

Membership	Rules	Structure	Resource Allocation

INSTITUTIONAL ANALYSIS IN THE CONTEXT OF THE CASE STUDY

	Membership	Rules	Structure	Resource Allocation
Household				
Community				
Market				
State				

GENDER, SOCIAL RELATIONS AND INSTITUTIONS

1. Gender relations interlock with other social/power relations to keep women in a subordinate position.
2. The other social relations in the Indian context include those based on hierarchies of caste, class, religious identity, ethnicity, age, sexual orientation, differential ability, occupation and health status.
3. Gender/social relations in turn are shaped by institutions of society: household, market (commodities, labour, finance, services, from local to international levels) community, state (executive, legislature, and judiciary), supra-state institutions.
4. These institutions take different organisational forms.
 - State is the larger institutional framework for a range of departments, ministries, local government organisations (Gram Panchayats¹ and Nagarapalikas²), judicial organisations (supreme court, high courts, district courts, family courts, *mahila* courts³, police stations etc.)
 - The market is the framework for organisations like farming arrangements, small scale enterprises, private limited companies, public limited companies, multinational companies, and private media.
 - The community comprises of different organisations like religious organisations, village traditional panchayats⁴, political factions, community groups, and NGOs.
 - The household may comprise of nuclear or extended families.
5. Thus institution is a framework of rules, ideologies and structures for achieving certain social or economic goals, and organisations refer to the specific structural forms that institutions take.
6. Each institution, as well as organisation, includes certain members and keeps certain members out, has rules or norms, distributes resources unequally, distributes decision-making powers differentially and has certain ideology.
7. Women, girls and elderly, in particular from dalit, adivasi and minority communities, from landless households, and from other socially excluded groups (e.g. sex workers, those affected by HIV/AIDS) are particularly disadvantaged through institutional rules, membership, resource and power allocation. This also applies to those who are sexual minorities and differently abled.
8. The official ideology of institutions is far from true in reality:
 - Households are not ‘altruistic’ but sites of ‘cooperative conflicts’.
 - Markets are ‘not neutral’ but biased towards the ‘rich’.
 - Most traditional community organisations do not maintain a ‘moral society’ but maintain ‘gender and social hierarchies’.
 - State does not ‘promote the welfare or protect citizens’, but at times violates or turns a blind eye to violation of women’s rights.
 - Supra-state institutions (in particular WTO and Bretton woods related) do not protect and promote the welfare of ‘global citizens’, but act in the interests of global capital and developed countries.

¹ Lowest level of self-governance in rural areas.

² Lowest level of self-governance in urban areas.

³ Women’s courts established by the government to deal with issues of violence against women and discrimination against them.

⁴ Traditional panchayats are different from the statutory local governments that are established by the state through elections. Often traditional panchayats are caste based or village based. In a village of households from different communities, the ‘upper’ castes and class control these panchayats.



MODULE 2
**GENDER ANALYSIS
AND POLICY FRAMEWORKS**

Module 2, Session 1

**GENDER DIVISION OF LABOUR:
ACCESS, OWNERSHIP AND CONTROL OVER RESOURCES,
AND DECISION MAKING**

Objectives

- *To understand the division of labour between women and men*
- *To identify the access and control profile of women and men*
- *To understand the decision making profile of women and men*

Materials

- *Chart papers/News prints,*
- *Marker pens*
- *OHP*
- *Handout 2.1.1*
- *Handout 2.1.2*
- *Handout 2.1.3*
- *Handout 2.1.4*

Time required:

One hour 30 minutes



METHODOLOGY

Alternative 1

1. Introduce the objectives and the concept of gender analysis (Handout 2.1.1).
2. Explain the tool of mapping activity profile and access and control profile (Handout 2.1.2, Handout 2.1.3).
3. Explain the tool of mapping decision making profile (Handout 2.1.4).
4. Divide participants into groups of six based on the social and economic constituencies they represent or work with. For example, dalits, minority, tribals, differentially abled, rural poor, urban poor, urban middle class, rural middle class etc. The participants should be familiar with the work and culture of these communities.
5. Request participants to prepare three charts. The first, listing out all the activities done by an adult woman and an adult man (if relevant also girls and boys) in a household belonging to the constituency assigned to them on a typical day. The second, listing out access and control of men and women (if relevant also girls and boys) over resources. The third, list areas of decision making of men and women in the household (other than labour and resources), and the degree of participation of men and women in decision making. Ask participants to use Handouts 2.1.2, 2.1.3 and 2.1.4 for this exercise.
6. Ask the groups to present their charts in the plenary.
7. Sum up the session highlighting the gender based similarities and differences in the activity profile, and access and control profile of men and women across caste, ethnicity, religion, class etc.
8. Sum up with (a) concept of gender based division of labour, triple roles, and valuation of work, (b) gender based access to and control over resources at the household level, (c) gender based participation in decision making (use points in Handout 2.1.1).

Alternative 2

1. Follow Step 1 to 3 of Alternative 1.
2. Divide the participants into groups of 6-8 persons and request them to prepare skits on the activities, access and control over resources and decision making of women, men, girls and boys in the household belonging to the constituency assigned to them on a typical day.
3. Present the skits in the plenary.
4. Follow steps 7 and 8 of Alternative 1.

Essential reading for the facilitator

Overholt et al, (1985) 'Women in Development: A Framework for Project Analysis' in Overholt et al (eds.). *Gender Roles in Development Projects: Cases for Planners*, USA Kumarian Press.
Gender Mainstreaming: Gender Analysis Action for Change, London/New Delhi:Oxfam.



GENDER-BASED DIVISION OF LABOUR, ACCESS, OWNERSHIP AND CONTROL OVER RESOURCES, AND PARTICIPATION IN DECISION MAKING

1. Gender analysis, simply put, is training our eyes to see what we have been trained not to see.
2. Gender analysis entails six steps, of which the focus of this session is on the first two:
 - Analysis of division of labour
 - Analysis of access and control over resources
 - Participation in decision making (other than labour and resources)
 - Identification of needs and interests
 - Identification of constraints and opportunities
 - Analysis of approaches to women's development
3. Gender based division of labour refers to socially defined roles and tasks of women and men within households, communities, and work places. Almost all roles and tasks are socially defined, except giving birth and breast feeding.
4. Analysis of gender based division of labour entails examining:
 - Who does what (roles and tasks¹), where, when and for how long.
 - Monetary and non monetary valuation of work of men/boys and women/girls.
- Whether the gender based division of roles and tasks, and their valuation, is social or biological.
- How the above leads to gender biases in access and control over resources and decision making power.
5. Key points on gender based division of labour:
 - The socially defined roles and tasks vary across cultures, but men are seen to be associated with productive labour (earning) while women are associated with domestic/child care (reproductive).
 - Women world wide work for more number of hours than men, particularly in poor communities.
 - Despite the long hours of work, women's work is deemed less paid and low skilled.
 - The roles that men do in the household and community are considered as higher 'status'.
 - Men in households often have control over women's labour. Refusal to comply to men's demands to use their labour either in own farms or for any other purpose makes women vulnerable to violence. At the same time, with increase in household income, men in some cultures demand that women stay in the house.

¹ Tasks refer to activities like weeding, ploughing, cooking, typing etc. Roles are broader, and include breadwinner, leader, farmer, home-manager etc.

6. Access to resources refers to ability to use resources, ownership refers to legal or customary ownership, while control refers to ability to make decisions related to resources. Gender based access to and control over resources refers to socially defined access and control of men and women over resources.
7. Key points on gender based access, ownership and control over resources:
 - Men as heads of household are often legally owners of household assets. Whereas women, except in few instances, only have access to household resources. This access also depends on their labour contribution to the household.
 - In the few cases wherein women legally own assets, like in matrilineal communities, they often do not control the same. The control is with their brother or their uncle.
 - Some assets are not legally owned like livestock, jewels, utensils, television etc, but there are norms governing its ownership often privileging men. In the event of household conflicts leading to separation, these norms adversely affect women's control over resources.
 - Similarly, most community resources are held by male composed or headed institutions (e.g. temple boards, Panchayati Raj institutions etc).
8. Key points on gender based participation in decision making
 - In addition to labour and resources, decision making can be on issues of their marriage, mobility, interaction, reproduction, sexuality, other household issues of political participation, and



community participation (in health committees, education committees etc).

- The degree of participation in decision making can range from representation, influence (on preset agenda), joint decision making, to sole say over decisions.
- Women in male headed households have less say over reproduction, sexuality, and mobility and interaction than men. However, their say in household decision making increases with their age. As a result they do have a higher say (though may still be unequal) on children's education and freedom given to them.
- Women are increasingly being represented in community structures and political spaces. However, representation does not mean influence, ability to set agendas, take decisions jointly, or solely. In local self governance institutions and watershed/irrigation/forest associations the gap between representation and (higher levels of) participation is highest, whereas in drinking water associations, and health committees the gaps may be lower. But even here major decisions are taken by government officials and workers.

References


- Overholt et al, (1985) 'Women in Development: A Framework for Project Analysis' in Overholt et al (eds.). *Gender Roles in Development Projects: Cases for Planners*, USA Kumarian Press.
- Gender Mainstreaming: Gender Analysis Action for Change*, London/New Delhi:Oxfam,update.
- Murthy R.K, (2006), *Poor Women's Economic Leadership in Developing Countries*, London/New Delhi:Oxfam(MIMEO).

GENDER BASED ACTIVITY PROFILE

Activity	 Women/ Girls	 Men/ boys	Time and duration	Place
<p>Production activities:</p> <ul style="list-style-type: none"> ▪ Paid labour / activities: <ul style="list-style-type: none"> - activity 1..... - activity 2..... - etc..... 				
<ul style="list-style-type: none"> ▪ Unpaid labour / activities In the productive sphere: <ul style="list-style-type: none"> - activity 1..... - activity 2..... - etc..... 				
<p>Reproductive activities:</p> <ul style="list-style-type: none"> ▪ Unpaid labour for the Household: <ul style="list-style-type: none"> - activity 1..... - activity 2..... - etc..... 				
<ul style="list-style-type: none"> ▪ Unpaid labour for the Community: <ul style="list-style-type: none"> - activity 1..... - activity 2..... - etc..... 				
<ul style="list-style-type: none"> ▪ Leisure time / education and training: <ul style="list-style-type: none"> - activity 1..... - activity 2..... - etc..... 				

Adapted from Women workers' rights : Modular training package, ILO Geneva, 1994

GENDER BASED ACCESS, OWNERSHIP, AND CONTROL PROFILE

	Access		Ownership/control	
	Women	Men	Women	Men
<p>Resources (for example):</p> <ul style="list-style-type: none"> • Land • Equipment • Labour • Cash • Jewels • Other 				
<p>Benefits (for example):</p> <ul style="list-style-type: none"> • Outside income • In-kind goods (foods, clothing, shelter, etc.) • Education • Health • Other 				

Adapted from Women workers' rights : Modular training package, ILO Geneva, 1994

Handout 2.1.4

DECISION MAKING PROFILE INTRA HOUSEHOLD (OTHER THAN LABOUR AND RESOURCES)

Tick ONE appropriate column for intensity of participation of men and women in decision making
(Use different colour pens for men and women)

Nature of institution	Level of participation in decision making (men and women)			
	Representation	Influence	Joint decision	Sole decision
Their Marriage <ul style="list-style-type: none"> • Whether to marry • Choice of partner 				
Mobility and interaction <ul style="list-style-type: none"> • Where to go and when to go • Whom to visit • Whom to call 				
Reproduction <ul style="list-style-type: none"> • whether to have children • how many • use of contraception • method of contraception 				
Sexuality <ul style="list-style-type: none"> • whether to have • with whom • safe/unsafe 				
Children <ul style="list-style-type: none"> • Degree of freedom to give their adolescent girls • Children's education 				

COMMUNITY AND LOCAL POLITICAL DECISION MAKING PROFILE:

Tick ONE appropriate column for intensity of participation of men and women in decision making
(Use different colour pens for Men and women)

Nature of institution	Level of participation in decision making (men and women)			
	Representation	Influence	Joint decision	Sole decision
Panchayati Raj				
Caste panchayats				
Drinking water users association				
Watershed associations				
School associations				
Health associations				
ICDS associations				
Religious associations				
Others				

GENDER NEEDS AND INTERESTS

METHODOLOGY

Alternative 1

Objectives

- *To develop a holistic understanding of human needs and interests*
- *To understand the concept of Practical Gender Needs (PGN) and Strategic Gender Interests(SGI)*
- *Develop skills to use the above framework to identify practical gender needs and strategic gender interests*

Materials required

- *Handout 2.2.1. Only for Alternative 1*
- *Handout 2.2.2. Only for Alternative 1*
- *Handout 2.2.3*
- *News print and markers, crayons and tape*

Time

Two hours



1. Draw a large circle on a news print and divide it into nine equal sections.
2. Facilitate a brainstorming session on basic human needs. The participants will certainly mention water, food, clothing, shelter and fuel. Fill these in one of the sections of the wheel and write “Subsistence Needs”.
3. Ask “besides these what else do we need to live meaningful lives?”
4. After a discussion on the above explain the “Wheel of Fundamental Human Needs and Interests” which classifies needs and interests into subsistence, protection, affection, understanding, freedom, identity, leisure and transcendence. (Handout 2.2.1).
5. Discuss what might be included in each of these categories and fill them in the different sections of the wheel. Discuss which elements are general and which are gender specific. Add from Handout 2.2.2 if necessary.
6. Divide the participants into groups of 5-6 based on the area they come from or the constituency they represent. (For example, dalits, minority, tribals, differentially abled, rural poor, urban poor, urban middle class, rural middle class etc.) They should be familiar with the life of the assigned social and economic groups.
7. Give each group a wheel with the nine segments and ask them to discuss to what extent each of these needs (general needs) is met in the constituency assigned to them. Shade each section indicating how far these needs are met.
8. After the group has indicated this ask them to discuss and indicate to what extent the gender specific needs of women in the constituency assigned to them are met. Use another colour to indicate this.
9. Present the coloured wheels in the plenary.
10. Facilitate a discussion on which needs and whose needs are met most? And why?

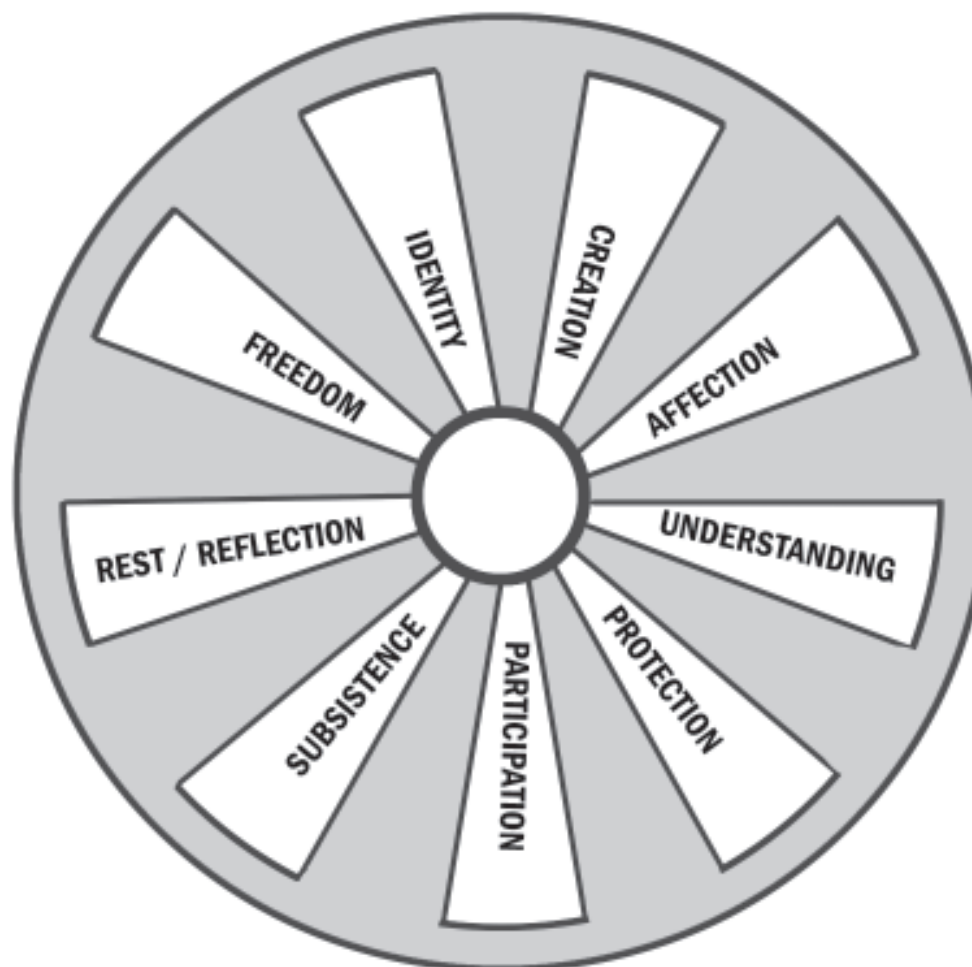
11. Give an input on practical gender needs and strategic gender interests (Handout 2.2.3) and link this up with the wheel of fundamental human needs (the gender specific needs column of Handout 2.2.2).
12. Conclude by stating that addressing both PGN and SGIs are important, and these need to be addressed simultaneously. Further, it is better for NGOs not to deliver services to address practical gender needs, but empower communities to demand that government addresses these. Similarly, it is necessary to empower communities to address strategic gender interests, rather than promote top down legal or policy measures.

Alternative 2

1. Introduce the concept of practical gender need and strategic gender interests (handout 2.2.3)
2. Relate back to the session on activity profile, access and control profile, and decision making profile. Take example of the outcome of discussion on activity profile, access and control profile, and decision making profile of one household. Ask the participants in the plenary to identify the practical gender needs and strategic gender interests of women.
3. Divide the participants into constituency wise groups (one less in number than for the Module 2, session 1, as one example has been taken in Step 2). Ask each group to identify practical gender needs and strategic gender interests of the women in the assigned household.
4. Ask each group to present, and allow for discussion and clarification of concept of PGN and SGI.
5. Conclude by stating that addressing both PGN and SGIs are important, and do need to be addressed simultaneously. Further, it is better for NGOs not to deliver services to address practical gender needs, but empower communities to demand that government addresses these. Similarly, it is necessary to empower communities to address strategic gender interest, rather than promote top down legal or policy measures.



THE WHEEL OF FUNDAMENTAL HUMAN NEEDS AND INTERESTS



Adapted from Hope, Anne and Sally Timmel (1995), *Training for Transformation*, Book 1.

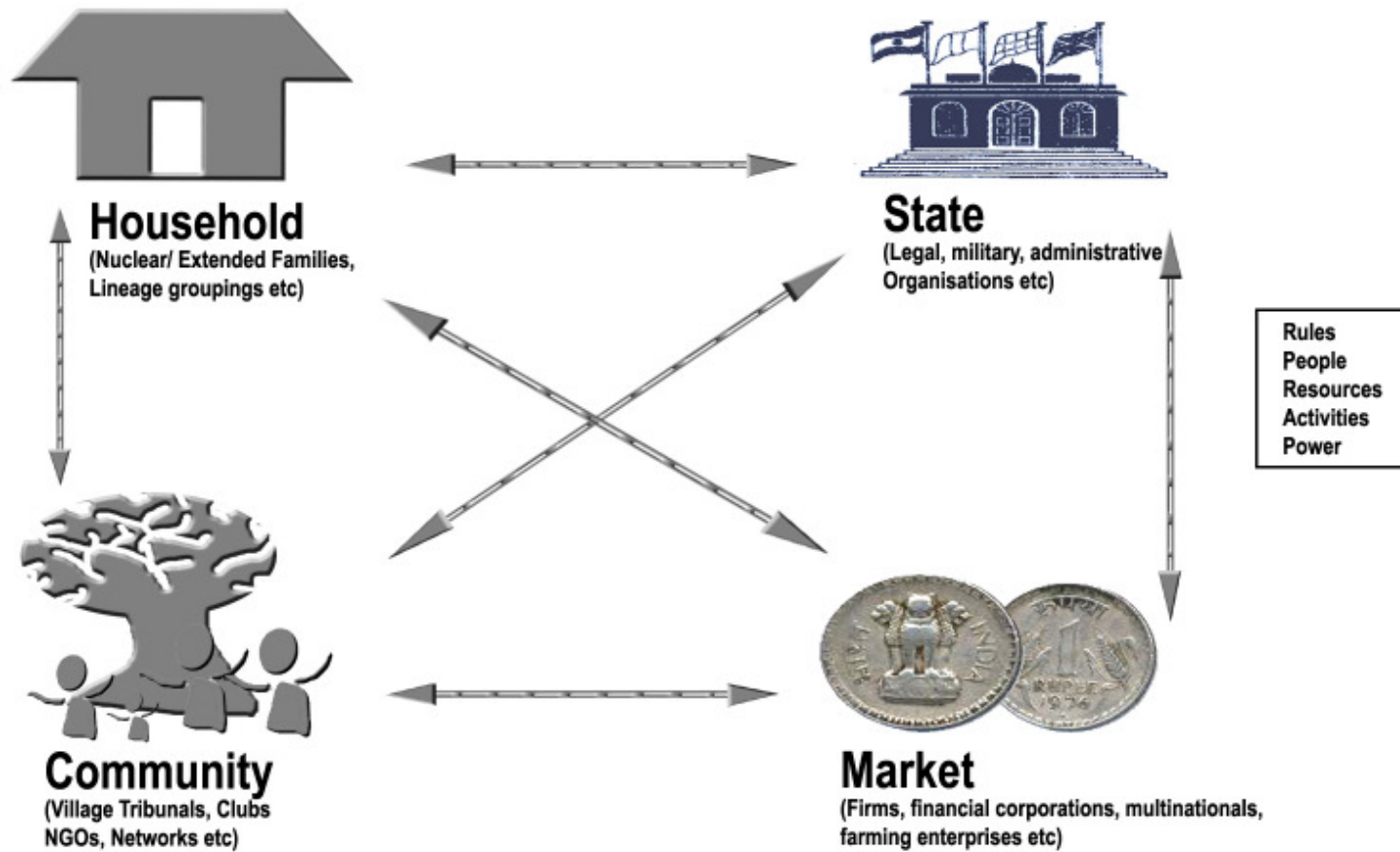
GENERAL AND GENDER SPECIFIC HUMAN NEEDS

Human Needs	General	Gender specific/Intensified
Subsistence	Village to village roads, electricity, basic education, primary health care etc.	Food, water, child care, care of the sick and elderly, fuel, roads to water points.
Protection	The need for protection from all major threats to human body and mind – including violence and conflict.	Protection from gender based violence.
Affection	The need for interpersonal relations of warmth and intimacy.	The need for affection irrespective of adherence to gender norms.
Understanding	Awareness of unequal structure of society, and interconnectedness of self, others and society	Awareness of patriarchal norms of gender in society and those that they have internalised.
Freedom	Ability to make decisions with regard to play, worship, work, education etc.	Ability to make decisions on one’s labour, mobility household resources, marriage, political participation, reproduction and sexuality.
Leisure	The time and space to relax, reflect, heal, and recreate.	The time and space to relax at home, and visit friends, natal family and places outside.
Identity	The ability to define and live one’s identity with regard to religion, nationality, and language.	The ability to define and live ones’ sexual and non traditional gender identities.
Trasncendance	The need to find an ultimate reality that gives meaning and purpose to one’s life.	The ability to be rooted in an understanding of spirituality beyond religion, gender and other divides.

PRACTICAL GENDER NEEDS AND STRATEGIC GENDER INTERESTS

A. Practical Gender Needs	B. Strategic Gender Interests
<ul style="list-style-type: none"> • Tend to be immediate, short-term • Varies with economic and social background of women • Related to daily needs; food, housing, income, health, child care etc. • Arises out of the existing gender division of labour • Easily identifiable by women. <p>Can be addressed in a top down manner by planners, or demanded by women themselves through thier mobilisation</p>	<ul style="list-style-type: none"> • Can be met mainly in the long-term • Common to almost all women • Related to disadvantaged position; subordination, lack of resources and education, vulnerability to poverty and violence, etc. • Basis of disadvantage and potential for change not always identifiable by women • Can be addressed by: consciousness-raising, increasing self-confidence, education, strengthening women’s organisations, political mobilisation, etc.





Adapted from Naila Kabeer, 1996

FORCE FIELD AND INSTITUTIONAL APPROACH TO GENDER PLANNING AND POLICY

Objectives

- To understand force field and institutional approach to planning for addressing strategic gender interests of women.
- To understand different ways in which gender may be present or absent in policy
- To understand different approaches to women's development,

Materials required:

- Handout 2.3.1
- Handout 2.3.2
- Handout 2.3.3

Time required

Two hours 30 minutes



METHODOLOGY

1. Ask the participants whether any of them are familiar with force field analysis, and draw upon their insights to flesh out the steps in force field and institutional approach to gender planning (Handout 2.3.1).
2. Take one strategic gender interest in one sector (e.g. health) or issue (e.g. violence) that emerged in Session 2 of Module 2, and illustrate in the plenary how to use force field and institutional approach to gender planning.
3. Divide participants into groups of five, and allocate one strategic gender interest of women or sexual/gender minorities per group. Ask each group to apply the force field and institutional approach to gender planning in their group, using Handout 2.3.2.
4. Ask each group to present, and other groups to comment. If necessary, add inputs.
4. From the presentation, cull out the following five policy approaches to women's development: welfare, antipoverty, equality of opportunity, empowerment, and equity approach. Elaborate that the equity approach combines the previous four, and is perhaps most relevant.
6. Point out that the neo liberal perspective often promotes a sixth approach to women's development, the efficiency approach which makes use of women's time and labour for other development goals .
7. From the presentation of strategies (following force field and institutional analysis) to address a strategic gender interest, also cull out different ways in which gender may be present or absent in policies. Explain that it is possible to distinguish between gender-blind, gender neutral, gender-specific, and gender transformative policies.
8. Reinforce concepts on gender in policy through reading out policy statements in Handout 2.3.3 and asking the participants to decide whether the statement reflects gender blind, gender neutral, gender specific, or gender redistributive policies (answers given in the handout itself).

Essential readings for the facilitator

Kabeer, N, (1994), Gender Aware Policy and Planning: A Social Relations Perspective In Macdonald, M (ed.), *Gender Planning and Development Agencies: Meeting the Challenge*, UK:Oxfam.

Kabeer, N and R, Subrahmaniam, (1996), Institutions, Relations, and Outcomes, Frameworks and Tools for Gender Aware Planning, IDS Discussion Paper 357.

Moser, C, (1993), *Gender Planning and Development: Theory, Practice and Training*, London:Routledge.

FORCE FIELD AND INSTITUTIONAL APPROACH TO GENDER POLICY AND PLANNING

1. Steps in force field and institutional approach to gender planning

Force field approach to gender planning entails the following four steps:

- Determining the gender need/interest (preferably strategic gender interest) one wants to address.
- Analysing the constraints at household, community, market, state, and inter-state institutional levels in addressing the gender interest.
- Analysing the opportunities at household, community, market, state, and inter-state levels to address the gender interest.
- Evolving strategies to make use of opportunities to address the constraints and thereby address the gender interest.

2. Institutions and organisations

Most institutions take several organisation forms:

- The community institution comprises of organisations such as traditional panchayats, religious organisations, NGOs, social movements etc.
- Markets could take the form of labour markets, commodity markets, finance markets, land markets, service markets and so on; and could be at local, district, provincial, national, and international levels.
- State could take the organisation form of executive, judiciary, legislature, and local governments. The executive could in turn comprise of various sectoral departments. Bi lateral agencies could be seen as an organisational form of the state, but of the donor country.
- Inter-state institutions could take the organisation form of UN organisations or neo liberal organisations like the World Bank, IMF etc.

3. Policy Approaches to women's/girls development

From the strategies that emerge, following a force field and institutional analysis to address a gender interest, it is possible to distinguish between the following five different approaches to women's development :

- *Welfare approach:* Goal is to address practical gender needs arising from women's role as mothers and wives, and adolescent girls' role as care givers for younger siblings and assistants in home-management.
- *Equality approach:* Goal is to promote formal equality (strategic gender interests), through legislations and policies that promote equality of opportunity across sex.
- *Anti poverty approach:* Goal is to strengthen skills and *access* to incomes of poor women (practical gender need) through anti-poverty programmes targeted at them.
- *Efficiency approach:* Goal is to increase efficiency of the economy or society through making use of women's skills and expertise.
- *Empowerment approach:* Goal is to address structures of gender and social inequities (strategic gender interests) through raising awareness and mobilisation around strategic gender interests.
- *Equity approach:* goal is to promote equitable gender and social outcomes in all spheres through combining welfare, equality, anti-poverty, and empowerment approaches (addressing both practical and strategic gender interests) as well as addressing other institutional constraints to achieving gender and social equity.

4. *Policy approaches to girls' education: An illustration*

For example, strategies to promote gender equality in secondary education following a forced field analysis may include:

- Lobbying for legislation on right to secondary education, and equal access of girls to secondary education (equality approach).
- Providing child care facilities in secondary schools and better drinking water in villages (welfare approach, to takes into account girls' needs arising out of their reproductive roles at home).
- Promoting poverty reduction programmes for families of poor girls, so that they do not have to withdraw girls for earning income (anti poverty approach).
- Raising awareness among adolescent girls, parents, and communities on right of adolescent girls to education, and strengthening their ability to demand that services are made available by the government as per education policy and legislation (empowerment approach).
- All the above, and addressing other constraints to adolescent girls' secondary education, like increasing proportion of women teachers, strengthening toilet and drinking water facilities, constituting sexual harassment committees in school, gender sensitisation of secondary school teachers etc. (equity approach).
- Raising awareness amongst community and parents on the importance of girls education for health and income of the family, increasing village productivity etc. (efficiency approach).

5. *Gender and Policy*

From the strategies that emerge following a force field and institutional analysis to address a gender interest, it is possible to distinguish between the following four different ways in which gender may be present or absent in policies.

- *Gender-blind policy*: Such policies do not talk about men and women, but general categories like development of households,

communities, agriculture sector etc. They are blind to gender differences in the allocation of roles and resources.

- *Gender-neutral policy*: Such policies remain aware of gender differences in division of labour, resources, and decision making, and take account of them, but not for addressing practical gender needs or strategic gender interests, but for other development goals. These policies are similar to the efficiency approach to women's development and in addition take men's roles into account for other goals.
- *Gender-specific policy*: Such policies are aware of gender differences, but take them into account only to address the practical gender needs of women and marginalised men, and not strategic gender interests of women. These policies are similar to the welfare and anti poverty approach to women's development discussed and in addition may also seek to address gender specific needs of men.
- *Gender redistributive policies*: Such policies are not only aware of gender differences in the division of labour, resources, and decision making; but also of power relations underpinning these. They intend to address strategic gender interests through challenging these power relations. These policies are similar to the equity, equality and empowerment to women's development.

Adapted from:

Kabeer, N, (1994), *Gender Aware Policy and Planning: A Social Relations Perspective* in Macdonald, M (ed.), *Gender Planning and Development Agencies: Meeting the Challenge*, UK: Oxfam.

Kabeer, N and R, Subrahmanianm, (1996), *Institutions, Relations, and Outcomes: Frameworks and Tools for Gender Aware Planning*, IDS Discussion Paper, 357.

Moser, C, (1993), *Gender Planning and Development: Theory, Practice and Training*, London: Routledge.

FORCE FIELD AND INSTITUTIONAL APPROACH TO GENDER PLANNING

Institution	Forces for (opportunities)	Forces against (constraints)
Household		
Community <ul style="list-style-type: none"> • Traditional panchayats • Religious organisations NGOs and social movements		
Markets <ul style="list-style-type: none"> • Labour markets • Commodity markets • Finance markets • Service markets (Think locally, provincially, national, globally)		
State <ul style="list-style-type: none"> • Local government • Executive • Legislative • Judiciary (Think locally, provincially, nationally)		
Inter-state <ul style="list-style-type: none"> • UN • World Bank • WTO • Others 		

STATEMENTS FOR ANALYSIS OF GENDER IN POLICY

The struggle aims at achieving equal (and just) wages for women vis-à-vis men.
(gender-redistributive)

The project aims at increasing agriculture production.
(gender-blind)

The programme aims at increasing women's access to credit.
(gender-specific)

The programme aims at gender, rights and leadership training of women elected representatives.
(gender-redistributive)

The project aims to increase returns from sericulture through involving women in mulberry cultivation as they have nimble fingers, and men in marketing as they can travel to cocoon markets.
(gender-neutral)

The programme aims at increasing the number of women in panchayats and nagarpalikas.
(gender-specific)

The project aims at providing boats for those affected by the tsunami.
(gender-blind)

The programme aims at raising awareness on immunisation and child care practices among mothers so as to reduce infant and child mortality rates.
(gender-neutral)



A relational analysis of gender inequality within the development process has far-reaching implications. It goes beyond the questions of male prejudice and preconceptions... to looking at institutionalised basis of male power and privilege. It also goes beyond looking at male power and privilege within the domestic domain of families and households, to uncovering its operations within the purportedly neutral institutions within development policies are made and implemented nor does gender analysis imply the symmetrical treatment of women and men. Just as a class analysis can be used to understand and address the problems of the poor, so too a gender analysis can be used to understand and address the problems of women's subordination.

Naila Kabeer



MODULE 3

APPROACHES TO ENGENDERING AN ORGANISATION

APPROACHES TO ENGENDERING AN ORGANISATION

Objectives

- To understand the elements of an organisation
- To have a basic understanding of gender issues in an organisation,
- To understand the different approaches to engendering an organisation

Materials

- Chart papers
- Handout 2.1

Time

Two hours 30 minutes

Materials for Alternative 2

- Chart papers
- Handout 2.1
- Handout 2.2

Time

Two hours 30 minutes



Methodology

Alternative 1

1. Introduce the objectives of the session.
2. Differentiate between institutions and organisations.
3. Ask the participants from each organisation to form organisation wise groups and discuss if their organisation is masculine or feminine and why, and present it in the form of a pictorial chart or a tableau.
4. Following presentations, cull out the elements of an organisation (Handout 2.1).
5. Cull out basic gender issues in each organisational element from the presentation.
6. Give inputs on technical, organisational and political approaches to engendering organisational change, and the need to combine the three approaches.
7. Conclude with the comment that the sessions that follow will explore how to engender each element of the organisation.

Alternative 2

1. Introduce the objectives of the session.
2. Differentiate between institutions and organisations.
3. Divide the participants into groups of five and give them the case study of an NGO (Handout 2.2) and ask them to rate the gender sensitivity of the organisation on a scale of 1 to 5 (one least sensitive, and five most sensitive), and give reasons for their rating.
4. Following presentations, cull out the elements of an organisation (Handout 2.1).
5. Cull out basic gender issues in each organisational element from the presentation.
6. Give inputs on technical, organisational and political approaches to engendering organisational change, and the need to combine the three approaches.
7. Conclude with the comment that the sessions that follow will explore how to engender each element of the organisation.

Essential reading for the facilitator

Burton and Pollack, (October 2002), *Gender Mainstreaming and Global Governance, Feminist Legal Studies*, Volume 10, No.3 and 4.

Rao and Kelleher, (May 2003), 'Institutions, Organisations, and Gender Equality in an Era of Globalization', in *Gender and Development*, Volume 11, NO. 1.

UNDERSTANDING NGOS AS ORGANISATION

1. Institution is a framework of rules for achieving certain social or economic goals, while organisations refer to the specific structural forms that institutions take.
2. The major institutions in society include household, community, markets, state and inter-state institutions.
3. NGOs can be seen as organisations which reflect gender, caste, class and other hierarchies in the institution of community, while at the same time trying to change all societal institutions.
4. NGOs comprise of seven elements:
 - Vision/mission/strategies
 - Programmes and activities
 - Planning, monitoring and evaluation systems
 - Human resources and HRD systems
 - Culture
 - Structures, leadership and accountability systems
 - Financial resources, budgets, and financial management systems
5. For engendering organisations (and integrating other social relations) one can either adopt a technical approach, organisational approach, or a political approach.
6. As per the technical approach, an effort would be made to put in place 'systems' and 'guidelines' to mainstream gender into each of the elements of organisations; within the limits of the mission of the organisation.
7. As per the organisational approach, one would put in place internal accountability processes to gender, like organising and raising awareness among women staff, increase their representation in leadership and governance, encouraging each organisations decision

to be reviewed from a gender perspective, and strengthening the organisations alliances with broader women's movements.

8. The broader purpose of the political approach is to strengthen the ability of the organisation to change institutions of society in favour of women and other marginalised groups, rather than limiting itself to achieving specific sectoral missions or empowering women staff and establishing gender aware culture.

Adapted from:

Kabeer, Naila , (1994), 'Gender Aware Policy and Planning: A Social Relations Perspective' in Macdonald, M (ed.), *Gender Planning and Development Agencies: Meeting the Challenge*, UK: Oxfam.

Burton and Pollack, (October 2002), *Gender Mainstreaming and Global Governance*, *Feminist Legal Studies*, Volume 10, No.3 and 4.



CASE STUDY OF PEOPLE'S SHAKTI¹

People's Shakti is an organisation working in 60 villages of the extremely backward Telengana belt of Andhra Pradesh. Its mission is to reduce poverty and caste-based atrocities in the area with a particular focus on dalit communities and landless and marginal/small farming households. It works with men and women from these constituencies. Its strategies are the following: a) To organise these constituencies at the village level, federate them at Taluk and district levels, and strengthen their capacities. b) Through these organisations develop and implement dry land agriculture and land lease programme, non-farm livelihood programme, micro-credit and women's rights programme, and legal literacy and legal aid programme for dalits. c) Use the field experience to advocate with government for development and implementation of appropriate poverty reduction and anti-dalit discrimination programmes.

It has formed four kinds of organisations at the village level: micro credit SHGs, farmers' associations, non-farm livelihood associations, and dalit morcha (or struggle) units. The landless households who have leased land for agriculture join the farmers' associations, while those who have taken up non-farm livelihoods enroll in the non-farm livelihood associations. The micro credit SHGs, farmers association, and non-farm livelihood associations are not dalit exclusive, but a majority of members are from dalit community. The dalit morcha unit is, as the name suggests, dalit exclusive. The micro-credit SHGs are women exclusive, the dalit morcha unit is men exclusive, while the farmers' associations and non-farm livelihood associations comprise mainly of men and few women heading households. Majority of leaders of mixed organizations are men. These associations are federated at Taluk level, and then district level.

All the associations have received training on structural analysis of society (caste and class in particular), participatory rural appraisal techniques for analysis of their village (transects, social mapping, wealth ranking, and seasonality analysis), role of respective associations, and participatory planning, monitoring and evaluation. The members of each association have also received training on sectoral issues, and government programmes as related to that sector. The savings and credit SHGs have in addition received training on gender concerns, including on violence against women.

The non-farm livelihood interventions include group based renting of tents and mike sets, group based renting of utensils, leasing of tamarind and other trees, leasing of a quarry, and formation of labour cooperatives for construction work. Each group was given a start up capital of Rs 50,000. As majority of the members of the labour cooperative members are men, they hire women to work with them. The savings and micro-credit SHGs have so far issued loans for consumption purposes, and small individual based livelihood activities like goat rearing, and petty shop establishment. Each savings and micro credit group was given a start up capital of Rs 15,000. Any case of violence against women is supposed to be taken up by them, though few have in reality done so. The farmers' association has promoted leasing of dry land by landless families, organic methods of strengthening soil fertility, rain water harvesting structures, and tank renovation interventions. Each association got a start up capital of Rs 50000. The dalit morcha unit raises awareness on legal rights of dalits, and also takes up any case of atrocity against dalits in the village. It first mediates with the village level traditional panchayat. Failing which it files First hand Investigation Reports (FIRs) with police.

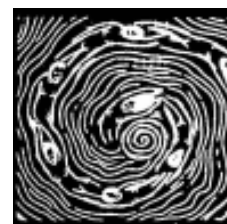
¹ This case study is purely fictional. Resemblance to any organization is purely coincidental, and not intended.

All the programmes are regularly monitored through a monitoring system that covers composition of members and leaders of all organizations (sex, class, and caste disaggregated), coverage (of people in village), number of trainings, composition of training participants, composition of beneficiaries of different programmes, repayment rates and loan over-dues. The number of caste based atrocities taken up is also monitored.

To support these programmes there are forty staffs, with twenty four being field level functionaries (50% women). Of the remaining 16, four are subject matter specialists- one on each of the following themes: micro-credit and women's rights (one person), dalit atrocity reduction, agriculture, and non-farm livelihood programme. Three staffs are coordinators of all field programmes in 20 villages each. The subject matter specialists work closely with the field coordinators. The NGO is headed by a Chief Functionary, and is supported by an Administrative In-charge, who in turn is assisted by an Accountant, two Secretaries and two Office Assistants (one for sweeping, and one for posting and photocopying). There are also two drivers.

The two Secretaries, one office assistant (for sweeping), one Field Programme in-charge, and micro credit and women's rights Coordinator are women. The last post is held by the wife of the Chief Functionary. While the Chief Functionary is a dalit, most of the staffs at leadership level (subject matter specialists, field programme coordinators and Administrative Incharge) are non dalits. A majority of the field staff and other office staff are dalits. The staffs at leadership level constitute the core team which takes managerial decisions of the organization, while the policy decisions are taken by a Governing Body with the Chief Functionary being the Secretary. The Board consists of nine persons, including six dalit leaders from Andhra Pradesh and two women (one dalit, and one non dalit))

While the organization has been trying to increase the number of women and dalits at leadership levels it has been difficult. Few dalits and women from the local area have the required qualifications of post-graduate degree with five years of experience in another NGO. The long working hours, and remoteness of the office location and field area are problems. Many unmarried women field staff, upon marriage leave; making it difficult for women to rise higher within the organization. A majority of the women staff are young and unmarried. The micro credit programme coordinator, is not interested in seeing another woman coming to leadership position, though she does not voice this publicly. The male staffs at leadership level, at times drink together after meetings. This has been another bone of contention within the organization, and outside. One woman prospective candidate for posts at leadership levels preferred to join a women only organization given this reputation.





MODULE 4
VISION, MISSION AND STRATEGIES

Module 4

VISION, MISSION AND STRATEGIES

Objectives

- To understand the terms vision, mission, and strategy.
- To develop skills in institutionalising gender within vision, mission and strategy.

Materials

- Handout 4.1
- Handout 4.2(Alternative 1)
- Organisation-wise vision, mission and strategy statement (alternative 2).

Time

Two hours 30 minutes



METHODOLOGY

Alternative 1

1. Introduce the objectives of the session.
2. Ask the participants what they understand by the terms ‘vision’, ‘mission’ and ‘strategy’, clarify each element (Use Handout 4.1).
3. Facilitate discussion on criteria for assessing gender sensitivity of vision, mission, and strategy (Use Handout 4.1)
4. Form participants into groups of five, give them vision, mission and strategy statements of an organisation and ask them to engender these statements (Use Handout 4.2).
5. Get the first group to present their analysis on the vision, and other groups to add on. Then ask the second group to do the same.
6. Highlight the similarities and differences across presentation, and cull out any additional points emerging on criteria for engendering vision, mission, and strategy of an organisation.
7. Wrap up the session with ways to bring about changes in vision, mission and strategy of an organisation.

Alternative 2

Pre workshop: Ask participants from each participating organisation to bring their vision and mission statement, and details on their strategy (explain key elements of organisation strategy in the pre-workshop letter).

- 1-3 Follow same steps as Alternative 1.
4. Form participants into organisation-wise groups, and ask them to strengthen their organisation’s vision, mission, and strategy from a gender lens.
5. Ask each organisation to write their presentation on a chart, and paste it on the wall.
6. Encourage participants to walk around (20 minutes), and see each others’ charts.
7. In the plenary, encourage clarifications on the presentations, and discussion on similarities and differences across organisations.
8. Pull out any additional points emerging on criteria for engendering vision, mission, and strategy of an organisation.
9. Wrap up the session with ways to bring about changes in vision, mission and strategy of an organisation.

VISION, MISSION, STRATEGIES

1. Vision refers to the organisation's understanding about the ideal society.
2. Mission refers to the long term goals of an organisation to move towards the vision.
3. Evolving an organisation strategy involves delineation of:
 - Geographical area where the organisation will work
 - Constituencies with whom it will work
 - Nature of relationship of organisation to constituency (strengthen, initiate, lead, deliver services, advocate etc.)
4. Criteria for institutionalising gender in vision:
 - Does the vision reflect values of gender equity?
 - Does the vision reflect values of equity between people of different classes, castes, race, ethnicities, religions, ages, abilities, sexual orientation, nationalities etc.?
 - Does the vision affirm life, livelihood and environmental sustainability for all?
 - Does the vision affirm values of inclusive, participative and deliberative democracy?
5. Criteria for institutionalising gender within mission
 - Does the organisation strive to promote and protect human rights of women and other marginalised groups (including sexual and reproductive rights)?
 - Does the organisation strive to expand the assets, production possibilities, and exchange options in favour of women and other marginalised groups in a sustainable manner?
 - Does the organisation, overall, strive towards transforming gender and other social relations at personal and institutional levels?
 - Does the organisation strive to govern itself in a democratic, participatory and gender sensitive/inclusive manner?
6. Criteria for institutionalising gender within organisational strategy:
 - Does the organisation work (directly/indirectly) in areas where gender inequalities are high?
 - Does the organisation work (directly/indirectly) with women and marginalised groups?
 - Does the organisation approach gender as a cross cutting issue (rather than have isolated programmes for women)? Similarly on environment?
 - Does the organisation strengthen or empower women and other marginalised constituencies rather than lead them or deliver services for them?
 - Does the organisation make the state accountable to women and other marginalised constituencies, rather than act as contractors of the state?
 - Does the organisation facilitate ability of women and other marginalised constituencies to realize their constitutional rights and rights as per international human rights instruments?
 - Does the organisation promote networking between grassroots women's organisations and broader women's and social movements?

Source

Definitions adapted by authors from inputs given by Anil Chaudhary, Chief Functionary, Popular Education and Action Center, New Delhi.



Vision is the art of seeing the invisible

Jonathan Swift

STATEMENT ON VISION, MISSION AND STRATEGY

Vision:

Just, equal, democratic, egalitarian, sustainable, and inclusive society

Mission

To strive to alleviate poverty

To promote and protect rights of marginalised

To promote participation of women in decision making processes

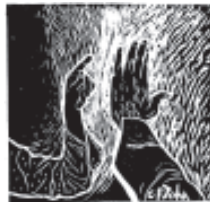
Strategy

Geographical area: Coimbatore district, Tamil Nadu

Constituencies: Rural poor

- Strengthen women's representation in Panchayati Raj
- Strengthen poor's access to income
- Strengthen district level campaigns around rights and poverty reduction of marginalised





The important thing is not to stop questioning
Albert Einstein



Module 5

ENGENDERING PLANNING, MONITORING AND EVALUATION

Module 5, Session 1

ENGENDERING PLANNING, MONITORING AND EVALUATION

Objective

- *To develop skills in evolving a gender sensitive programme plan, including for one's own organisation.*

Materials

- *Handout 5.1.1(Alternative 1)*
- *Latest statistical profile of Tamil Nadu- including district wise data (Alternative 1).*
- *Organisation wise pre existing programme plans (Alternative 2).*
- *Latest statistical profile of the states/countries where each organisation is working (Alternative 2).*

Time

Three hours

METHODOLOGY

Alternative 1

1. Introduce the objectives of the session.
2. Ask participants what they see as the steps in moving from vision, mission and strategy to programme planning, and the gender concerns at this stage.
3. Explain the steps in moving from vision, mission and strategy to programme planning (linking to the session on force field and institutional approach to gender planning) (Handout 5.1.1).
4. Divide the participants into groups of five, and ask them to work on the engendered vision, mission and strategy statement from Module 4, and evolve gender aware programmes. Ask them also to use the statistical profile of Tamil Nadu that is given to them.
5. Get the first group to present their analysis on the vision, and other groups to add on. Then ask the second group to do the same.
6. Highlight the similarities and differences across presentations, and cull out any additional points emerging on criteria for engendering programme planning.
7. Wrap up the session with ways to bring about changes in programmes of an organisation.



Alternative 2

Pre workshop: Ask each organisation to bring their organisation's programme plan with them, as well as the statistical profile of their state or the country as relevant.

1-3 Same as Alternative 1

4. Form participants into organisation-wise groups, and ask them to strengthen their organisation's programme plan from a gender lens.
5. Ask each organisation to write their presentation on a chart, and paste it on the wall.
6. Encourage participants to walk around (20 minutes), and see each others' charts.
7. In the plenary, encourage clarifications on the presentations, and discuss on similarities and differences in programme plans across organisations.
8. Pull out any additional points emerging on criteria for engendering programme plan of an organisation, which are not in Handout 5.1.1.
9. Wrap up the session with ways to bring about gender sensitive changes in existing programme plans of an organisation.

Essential reading for the facilitator

Kabeer, N. and Subrahmanian, (1996), 'Institutions, Relations and Outcomes: Framework and Tools for Gender-Aware Planning', IDS Discussion Paper 357, Appendix 1.

_____, (1996), *Gender and Development, Gender Training Manual Series: Volume III*, CEDPA, Hand out 7E1.

UNDP, *Introductory Gender Analysis and Gender Planning Training Module for UNDP* (staff www.undp.org/gender/resources/Gender%20Mainstreaming%20Training%20Module.pdf) Downloaded 9 February, 2005 (Handout mainstreaming gender into projects).

STEPS IN ENGENDERING PROGRAMME PLANNING

1. Ensure that the vision, mission, constituency and geographical area reflect a gender perspective, following steps indicated in Module 4.
2. For each constituency, examine gender disaggregated statistical and qualitative profile for the geographical area where the organisation works, and derive the present and desired state of the constituency.
 - Restrict focus to issues pertaining to the mission of the organisation, and not issues outside.
 - Use gender sensitive qualitative and quantitative data.
 - For quantitative data to discern present status of the community, use both government statistical profiles (providing gender disaggregated data), as well as data through surveys carried out by NGOs. Ensure that quantitative data is gender, social relations, and age disaggregated, and relevant to the mission of the organisation.
 - Baseline data may be gathered which covers practices and resources at the household, community, markets, state levels, and inter state (if an international advocacy group) levels, in particular focusing on issues related to the mission of the organisation.
 - If the constituency is women and other marginalised groups, involve them in this process, as well as social development specialists. Use participatory tools for qualitative mapping of the present and desired state, ensuring that the tools explore gender-specific dimensions, and are held separately across genders and age groups. The gender disaggregated data gathered through base line surveys may also be presented back to the community at this stage.
- Ask programme staff from all levels of the organisation to use the qualitative data (from participatory exercises) and quantitative data (from government data, baseline data, and any data generated through participatory methods) to map present and desired status of each constituency.
- Ensure that programme staffs undergo gender training before this exercise, and identify both practical and strategic gender interests while envisioning the desired state.
3. Encourage programme staff from all levels of organisation to examine the general and gender specific constraints and opportunities at household, community, markets, state, and inter state levels in moving from present to desired state (covering both practical and strategic gender interests) for each constituency.
4. Encourage programme staff to brainstorm on what the organisation needs to do (programmes) to make use of the general and gender specific opportunities to address constraints, and thereby enable the constituency to move from present to (strategic) desired state.
5. Ensure that the programme strategies that emerge do not remain at the level of only welfare, anti-poverty, equality of opportunity, or efficiency approaches to women's development, and combine the first three with empowerment and equity approach.

6. Ensure that the programme strategies beyond those directed at women, are gender redistributive (in particular men sharing domestic work and child care) and address gender specific needs of men (for example, addressing de-addiction needs of men) .
7. If the programme is adding new responsibilities, examine who is likely to bear the burden, and it is not dis-proportionately borne by women.

Adapted from :

Inputs given by Anil Chaudhary, Chief Functionary, Popular Education and Action Center, New Delhi in workshops co-facilitated by him with authors.

Kabeer and Subrahmanian (1996), ' Institutions, Relations and Outcomes: Framework and Tools for Gender-Aware Planning', IDS Discussion Paper 357, Appendix 1.

_____, (1996), *Gender and Development, Gender Training Manual Series: Volume III*, CEDPA, Handout 7E1.

UNDP, *Introductory Gender Analysis and Gender Planning Training Module for UNDP staff* (www.undp.org/gender/resources/Gender%20Mainstreaming%20Training%20Module.pdf)

Downloaded February, 9, 2005 (Handout mainstreaming gender into projects)



Objectives

- *To understand the meaning of indicators, the different types of indicators, and criteria to be kept in mind while developing indicators.*
- *To understand what are gender sensitive indicators, and be able to develop gender sensitive indicators for monitoring and evaluation.*

Materials required

- *Handout 5.2.1*
- *Handout 5.2.2*
- *Handout 5.2.3*

Time

Three hours



METHODOLOGY

Part I: Understanding concepts

Alternative 1

1. Introduce the objectives of the session.
2. Ask the participants what they understand by the term ‘indicator’, and record on chart paper.
3. Sum up what an indicator is using the ideas from brainstorming (step 2), and Handout 5.2.1.
4. Adopting a similar process, define gender-specific indicators.
5. Choose a sector (e.g. agriculture) or issue (e.g. violence) that the participants are familiar with, and ask the participants to come up with a list of general and gender specific indicators in the plenary. Ensure that both qualitative and quantitative indicators emerge.
6. Record these indicators on a chart, slide or black board.
7. Ask the participants to list the criteria for evolving indicators, and using these criteria as well as those in Handout 5.2.1 (i.e. specific, relevant, measurable, and captures trends), determine which of the indicators listed in Step 5 actually meet these criteria.
8. Discard indicators from Step 5 that do not meet these criteria.
9. Introduce the terms qualitative and quantitative indicators (use Handout 5.2.1), and ask participants in the plenary to pick out examples for each from indicators left at the end of step 8.
10. Ask the participants to define inputs, process, output and impact indicators using Handout 5.2.1, and classify indicators left at the end of Step 8 into these categories.

Part II: Applying concepts

Alternative 1

1. Divide the participants into groups of five persons.
2. Give each group a set of 12 indicators (Handout 5.2.2, without answers) and ask the groups to classify them into general and gender specific, input, process, output and impact indicators.
3. Ask each group to present their findings, and resolve differences in plenary (answers indicated in Handout 5.2.2)

Alternative 2

1. Divide the participants into groups of five persons.
2. Distinguish between monitoring and evaluation (Handout 5.2.1).
3. Give the group a weak and gender blind monitoring system of one programme (Handout 5.2.3) and ask them to strengthen the same in terms of the following: (a) input, process, output, and impact indicators, and (b) gender specific indicators.
4. Ask each group to present their analysis, and ask other groups to add new points if any. Suggest additional changes where necessary.
5. Point to the need for each participating organisation to re-look at their own monitoring and evaluation indicators and systems.

Essential reading:

(1997), *Guide to Gender Sensitive Indicators*, Canada: CIDA.

GENDER SENSITIVE INDICATORS FOR MONITORING AND EVALUATION

1. An indicator is a pointer. It can be a measurement, a number, a fact, or a perception that points at a specific condition or situation, and measures changes in that condition or situation over time.
2. Indicators can be quantitative or qualitative, and using both is important. Quantitative indicators can be defined as measures of quantity (such as number of villages covered), while qualitative indicators measure people's perceptions and judgments about an issue (such as satisfaction of villagers with the NGO intervention in the village).
3. Indicators are of four types: inputs, process, outputs and impact.
 - Input indicators concern resources (staff, infrastructure, funds etc.) devoted to the project/programme.
 - Process indicators track progress in implementing plans (e.g. proportion of training programmes conducted as planned).
 - Output indicators track immediate results of intervention (e.g. changes in knowledge, attitudes and skills apparent through pre- and post-workshop questionnaire).
 - Impact indicators track long term impact of the intervention (e.g. what changes have participants brought about in the community after training)
4. Gender-sensitive indicators have the special function of pointing out gender-related changes in society over time. Gender specific qualitative and quantitative indicators, and gender specific input, process, output and impact indicators are essential for tracking gender related changes. As all women and men are not the same, gender indicators need to be disaggregated by caste, class, ethnicity, minority status, age, abilities, sexual/gender orientation etc., depending on the context.
5. Input, process and output indicators are used for monitoring, while impact indicators are used for evaluating. For monitoring and evaluation to be successful mission, objectives, programmes, and implementation plans need to be clearly spelt out, and in gender specific terms. Baseline data must be available.
6. Indicators should be developed in a participatory fashion, should be sex disaggregated, should be qualitative and quantitative¹, should be technically sound², relevant³, measurable, should capture trends, and not too many⁴.
7. It is important that monitoring formats include sex/socially disaggregated input, process and outcome indicators, and data gathered is available to not only staff in-charge of the programme, but also those implementing them and marginalised women and men from the community.

Adapted from:

_____, (1997), *Guide to Gender Sensitive Indicators*, Canada: CIDA.

¹ Even qualitative indicators can be quantified. For example, proportion of participants (quantitative) satisfied (qualitative) with a training programme.

² For example, if indicators of a woman's health are being determined, infant mortality rate may not be a technically sound indicator. Prevalence of anemia or morbidity rate may be a better indicator.

³ Relevance refers to relevance of indicators vis-à-vis objective. If the programme objectives is to reduce gender disparities in health, morbidity rate amongst women as a proportion of men may be a more relevant indicator than morbidity rate amongst women.

⁴ A maximum of six input, process, output, and impact indicators per programme is ideal.

ORGANISATION-PROGRAMME PROFILE AND INDICATORS

Mission

To strengthen the extent to which decisions at the community level address practical gender needs of women and men and strategic gender interests of women.

Governance programme objectives

To increase women's participation and influence in PRIs and grass roots decision making spaces from 10 percent to 35percent

To strengthen men's participation in non-traditional community spaces from 0 to 25percent

Programme activities:

- Encouraging women to enter PRIs
- Encourage men to enter Anganwadi¹ and health committees
- Training of women and men on leadership and gender issues
- Facilitating gender budgeting and expenditure exercises
- Facilitating gender auditing of services/activities

Indicators:

- Percent of intervention village where men and women report decrease in male alcoholism (impact and gender)
- Percent of women and men participants to total participants in training on leadership and gender (process and gender)
- Percent of women staff to total staff (input, gender)
- Percent of women in public distribution, school and watershed committees, and percent of men in anganwadi and health committees, and percent who actually take part in decision making (output and gender)

- Percent of PRIs that have gone through a gender budgeting/expenditure exercise (process, and gender)
- Percent of staff trained on gender and gender and governance (input and gender)
- Percent of intervention villages that report that they have access to electricity (impact, and general)
- Percent of PRIs and community based organisations that meet as per the plan without staff being present (output and general)
- Percent of resources of CBOs budgeted/spent for services that meet women's and men's practical gender needs, and women's strategic gender/caste/other interests or percent reporting an increase in budget allocated to these (output and gender)
- Percent of trainings of community based organisations completed as per training plan (process, general)
- Percent of intervention villages where women report decrease in gender based violence (impact, and gender)
- Percent of total budget allocated to governance programme (input and general)



¹ Anganwadis are child care and nutrition centers for children in the age group of 0-5 years, as well as pregnant and lactating mothers and adolescent girls.

PROFILE OF MONITORING AND EVALUATION SYSTEM OF GOVERNANCE PROGRAMME

Representation in community governance structures

Nature of committee	Members			Leaders			No. of times met last year	Attendance percent (average)			Rating by staff on functioning				
	M	W	T	M	W	T		M	W	T	1	2	3	4	5
Panchayati Raj															
Watershed committees															
Public distribution system committee															
Water users committee															
School committees															
Health committee															
Anganwadi committees															
Others															

M: Men, W: Women, T: Total

1: Very poor, 5: Very good

Training programme

Nature of training	No. planned	No. completed	Total participants			Participants feedback (average rating)						
			M	W	T	1	2	3	4	5		

M: Men, W: Women, T: Total

1 Very poor, 5: very good



I think we must think seriously about difference. Otherwise, its meanings – embedded in unstated norms, institutional practices, and unspoken prejudices- will operate without examination or justification

Martha Monow

Methodology

Part 1: Understand the gender and institutional analysis matrix

Objectives

- *To understand gender and institutional analysis matrix, and develop skills in using it for evaluation.*
- *To understand gender issues to be kept in mind during evaluation.*

Materials

- *Charts*
- *Marker pens*
- *Handout 5.3.1*
- *Handout 5.3.2*
- *Handout 5.3.3*
- *Handout 5.3.4*

Time

Two hours



1. Introduce the objectives of the session.
2. Introduce the modified Gender and Institutional Analysis Matrix, and explain (a) the different levels of analysis viz. the modified gender analysis matrix: Impact on women/girls and men/boys at household, community, markets, and the state (rows); and (b) the different aspects of analysis viz. impact on labour, resources, bodily integrity, and political participation (columns). Use Handout 5.3.1.
3. Explain how impact on diverse groups of women and men could be incorporated within the matrix, as well as different aspects of division of labour, access and control.
4. Acknowledge that the original version- the Gender Analysis Matrix- was developed by Rani Parker, and the key changes made to the earlier version from a social relations and institutional perspective.
5. Make it clear that this matrix should not be seen as totally different from the earlier session on indicators. Impact indicators on labour, resources, bodily integrity (reproduction, sexuality, freedom from violence), and political decision making can be integrated into this matrix.
6. Divide the participants into groups of five. Give each group the case study on a micro credit intervention (Handout 5.3.2), and ask the group to use the modified Gender and Institutional Analysis Matrix for carrying out a gender impact assessment of the micro-credit programme. .
7. Ask one group to present impact on women and men at household level (all columns), and others to add on, then ask another group to present impact on women and men at community level, and so on, till impact on women and men in all institutional sites is covered.
8. Add any additional insights.
9. Explain that if the intervention is at the international level, impact on inter-state institutions could also be included.
10. Conclude by stating that this matrix could also be used at the planning stage for assessing potential impact.

Part 2: Gender and social issues in evaluation

1. Introduce that gender and social issues in evaluation are beyond issues of evolving appropriate indicators or tools for assessing gender impact of interventions.
2. Divide the participants into three groups of equal numbers.
3. Ask one group to put up a role play on a gender and socially blind evaluation process, the second group to put a role play on a gender and socially aware evaluation process, and the third group to observe both the role plays and comment on what are the gender issues to be kept in mind during evaluation. Give briefing to the first two groups (Handout 5.3.3).
4. Ask the first and second group to present the role play, and the third group to present the lessons that they have learnt on gender and social issues in evaluation.
5. Add additional insights if any, and summarise key gender and social issues to be kept in mind during evaluation (Handout 5.3.4).



GENDER AND INSTITUTIONAL ANALYSIS MATRIX

1. This matrix has been adapted from Rani Parker's Gender Analysis matrix, which focused on analysis of potential or actual impact of community development projects on men, women, household, and community; and with regard to four aspects; labour, resources, culture and participation.
2. The Gender and Institutional Analysis Matrix entails analysis of the impact of community based *and advocacy interventions* of NGOs on women/girls and men/boys at the household, community, market, and state level. NGOs could be assumed to operate in the institutional space of community. However, it may be useful to separate them from other organisations that are part of the institution of community.
3. With regard to impact at the state level, the impact could be on women and men *in* different organisation forms of state, or with regard to policies, legislation, practices, and budgets of state which have a bearing on women and men at the community level.
4. If the NGO is intervening at an international level, impact on inter-state institutions could be assessed (in particular neo liberal ones). This analysis could be along the same lines of impact on the institution of the state.
5. The impact can be assessed with regard to four aspects:
 - *Labour*: The gender division of tasks and roles, valuation of work, skills, number of livelihoods, number of days of employment, seasonality of employment, mobility, etc.
 - *Resources*: Access and control over resources and benefits.
 - *Bodily integrity*: Rights over sexuality, rights over reproduction, and freedom from violence.
 - *Political participation*: Representation, influence, and decision making in traditional panchayats, in local self governance institutions, in community user groups, in district level committees, in legislative assemblies and parliament.
6. Combining 2 to 5, the Gender and Institutional Analysis matrix can be mapped as follows:(Next page)



GENDER AND INSTITUTIONAL ANALYSIS MATRIX

Impact on women and men at which level?	Impact on What?			
	Labour	Resources	Bodily integrity	Political participation
Household level <ul style="list-style-type: none"> • Women • Men 				
Community <ul style="list-style-type: none"> • Women • Men 				
NGOs <ul style="list-style-type: none"> • Women • Men 				
Markets <ul style="list-style-type: none"> • Women • Men 				
State <ul style="list-style-type: none"> • Women • Men • Policies/legislation • Practices/budgets with gendered implications 				
Inter-state <ul style="list-style-type: none"> • Women • Men • Policies/practices, legislation/budgets with gendered implications 				

7. All positive changes could be marked '+', all adverse changes could be marked '-', and wherever doubts exist the change could be marked as '?'
8. The matrix could be used for assessing impact on different groups of men and women, across age, caste, class, marital status, ethnicity, religion, sexual orientation etc. The impact on both 'participants' in NGO programmes, and non-participants could be analysed.
9. For using the matrix for gender and institutional analysis discussions need to be had with:
 - Individual women and men, separately.
 - Groups of women and groups of men (belonging to different groups) at community level, in separate groups.
 - NGO women and men staff at different levels, in separate groups.
 - Leaders of different community institutions (each institution separately).
 - Traders, employers, money lenders etc. at different levels.
 - Government officials, members of judiciary, and politicians at different levels.
 - Meetings with officials of inter-state institutions, if an international project.

Adapted from:

Parker, Rani (1990), *A Gender Analysis Matrix for Development Practitioners*, Praxis, The Fletcher School of Law and Diplomacy, Tufts University, Medford.



CREDIT PROJECT FOR RURAL WOMEN¹

The Madhya Pradesh Women's Development Project (MDWDP) was initiated in 1998 with the objective of reducing poverty and empowering women from marginalised economic and social groups. Particular attention was to be paid to those households living below the poverty line, and amongst them women headed households, dalits and tribals. The principal strategy was to collaborate with NGOs and form women only SHGs involved in savings and credit operation; and subsequent to the group's maturity to link them to commercial banks.

The MDWDP collaborated with several NGOs in the state, and one such agency was the "Women In Development Society" (WIDS) working in 60 villages of Raigad district since 1995. It is a sister organisation of the "Rural Integrated Development Society" (RIDS), which has been working in the area for the last ten years organising self help groups of the poor around credit, agricultural and natural resources. As it was felt that women were not adequately integrated into the activities of RIDS, a separate organisation was started to generate supplementary income for women, and to enhance the education and health status of women, and through them, their families. As RIDS had a good reputation with government, WIDS was approached in 1995 by the Madhya Pradesh government. As the government wanted to show immediate results, it was decided that sixty groups would be organised in the first year, one in each village. Four women and two men supervisors were recruited by the NGO each in-charge of ten villages. The MP government recommended that the wife of the panchayat leader should be used as a contact point to enter the village and identify poor rural women, and the women staff of WIDS followed this guideline. Two of the women staff had children to look after, and hence could not visit the village in the evenings. They therefore met women who were in the village in the daytime, and organised a group of 20-30

women (the group size as per the scheme) in each village in their area of operation around credit and savings. The other two women and two men staff visited the village in the evenings. As each staff had to monitor ten groups, he/she could at the maximum attend one group meeting of every group every month.

Each group began with a thrift programme wherein every member saved Rs. 20 to 50 per month with the group (a fixed amount decided by each SHG), which in turn would be used to lend to the group members for consumption purposes. Once the group had shown its ability to manage the petty-credit and saving operations, the MP government and the funding agency together provided a matching grant at the ratio of 1 (internal capital): 2(matching grant), which it had to rotate as seed money to meet the needs of its members. It also linked the group to commercial banks, which provided loans to individual members for income-generation activities, with the subsidy being released at the time of loan repayment. Some poor women however did not join SHGs, as they could not afford to save the compulsory amount set by the group.

However, this norm that matching grant and bank loans will be arranged only after maturity of the group, could not always be followed. As targets had to be achieved, irrespective of the cohesiveness of the group and its' ability to manage finance, matching grant was provided for new groups as well. Each group selected a literate representative whose responsibility was to execute decisions taken by the group and ensure that the records were maintained up-to date. However, in some instances the representative herself took the responsibility of leading the group – in particular identifying poor women amongst its members, appraising the feasibility of activities proposed by the member, monitoring the repayment and managing finances of the group.

¹ This case study is entirely fictional. Any resemblance to an existing project in Madhya Pradesh or elsewhere is unintentional.

In most of the villages, men were happy with this new scheme for women. They accompanied the women to the bank, the Block Development Office and the WIDS office. They also attended group meetings of women and helped them make decisions. Several of the men engaged in agriculture had availed themselves of loans ranging from Rs.25,000 to Rs. 50,000 for land development, irrigation and businesses from commercial banks. They felt that the Rs.750-Rs.3,000 which their mothers, wives, and daughters could get as loans from the women's SHGs or commercial banks would come in handy to purchase seeds, fertilizers, and other inputs. They could not get crop loans from the banks, when they had land development and irrigation loans still to repay. As women had household work, the men decided not to increase their responsibilities and they themselves went to purchase inputs required for cultivation using the loan given to the women member of the family. This anyway was the usual norm. The same patterns followed for marketing. Wherever the men were responsible, they contributed 70-75 % of the money to their women-folk for repayment of loan. In other cases- especially where they were prone to excess consumption of alcohol- women had to scrounge for repayment of loans, and at times had to cut down their own consumption of food.

However, there were a few women-cultivators in the women's group (predominantly dalits) who were either single (husbands had died or deserted them) or managing their household's farms in their husband's absence who used agricultural credit and managed marketing themselves. The women headed and women managed households without land and adequate labour power was encouraged by WIDS staff to take up tailoring (linked to supplying school uniforms) and animal husbandry (crossbred cows) activities under the Swarnajayanti Gram Swarozgar Yojana (SGSY) scheme. They took up these activities taking a loan of Rs. 7,000-Rs 10,000 from the bank. School uniform and dresses were required only

during some part of the year. Milch animals yielded more milk during winter, and less or none during summer. Because of these new activities, they had given up working as agricultural labourers through which they earned Rs. 35 per day for 200 days a year. But the income from the new dairying and tailoring activities was more irregular. They therefore sold off their assets, repaid their loans, and went back to wage labour. They felt that what they required was not a supplementary source of income but some activities that would provide them more than Rs 35. per day round the year. Along with it they did not mind some country cows or sheep or two, which could be reared by the children or elderly in the family.

An assessment of the project was made after two years by the MP government, funding agency, and WIDS team (one male Director, one woman second line leader, assisted by 6 women staff and 3 men staff). It concluded that the project was a great success: 120 women's groups were organised in two years, 3600 women had been covered, and Rs.27,00,000 had been given out as loans to groups of which 80% was being paid back on time. However, in some area the recovery was only 60% on crop loans. The family income, on an average, had gone up by Rs. 2,000 per annum because of the programme, and was therefore a good supplementary income generation programme for the household. This amount had been invested by some in better housing, food and nutrition, children's education or productive assets for the household. In some households, however, a marked gender differentiation in use of increased income could be seen. For example, some families preferred investing in education of sons, and accumulating dowry for their daughters.

The funding agency and the MP government requested WIDS to act as the nodal agency for co-coordinating NGO efforts in the Raigad district of MP related to the programme; and sanctioned funds for a training centre in this regard.

BRIEFING FOR ROLE PLAYS

Briefing for role play on gender insensitive evaluation

The evaluation is of an agriculture project, with a micro credit component targeted at women.

1. Of the three evaluation mission members, one has internationalised patriarchal and upper caste norms and two do not know much on gender issues.
2. The Terms of Reference (TOR) asks the mission to examine the impact of micro-credit programme on women's access to credit and income, but does not mention anything about assessing gender impact of the agriculture programme.
3. Evaluation team members stay in a city/town, and visit the villages between 9 AM to 5 PM.
4. The evaluation team have a meeting only with the core committee of the NGO, where women are few; and do not meet the field staff.
5. The evaluation findings are presented only to the donors and NGO head, and not fed back to community women, especially the marginalised or the field itself.
6. Add your own insights!
3. Evaluation methods are gender/socially aware and participatory.
4. Meetings are held late in the evening, when women from labouring class are free and in a place convenient to women.
5. The evaluation team meets women and men from dalit and other marginalised communities.
6. The evaluation team meets field staff, middle level staff, leaders, and board members separately, and examines all HRD and planning monitoring and evaluation systems from a gender lens.
7. The evaluation results are fed back to marginalised women and men in the community.
8. Add your own insights!

Briefing for role play of a gender sensitive evaluation

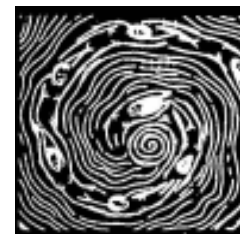
1. Terms of Reference, evolved jointly with the NGO and federation leaders, includes gender/social specific input, process, output and impact indicators.
2. A gender and social development expert is part of the evaluation tem.



INTEGRATING GENDER CONCERNS IN EVALUATION

During evaluations the following aspects may be kept in mind:

1. The Terms of Reference includes gender/social specific input, process, output and impact indicators.
2. A gender and social development expert is part of the evaluation team.
3. Evaluation methods and tools are gender/socially aware and participatory, and should assess impact at all institutional levels- household, community, markets, state and inter-state neo liberal institutions (if an international intervention).
4. Unanticipated gender impacts- both positive and negative- are also to be captured.
5. Grass roots meetings are held at a time and place convenient to poor women and marginalised men.
6. Questions of a sensitive nature are explored in total privacy, and care is taken that there is no backlash against women, marginalised men and children.
7. Evaluation team members meet women and men from dalit and other marginalised communities.
8. Evaluation team members meet field staffs separately (in addition to staff at leadership levels), wherein a majority of women staff are located.
9. Gender sensitivity of organisational processes is best discussed with women staff at field level.
10. The presence or absence of gender infrastructure (in all its aspects) may be explored, and could be discussed with staff at all levels.
11. Evaluation results are fed back to marginalised women and men in the community, as well as NGO staff at all levels.



*To exist is to change,
to change is to mature,
to mature is to go on creating oneself endlessly.*

Henri Bangson

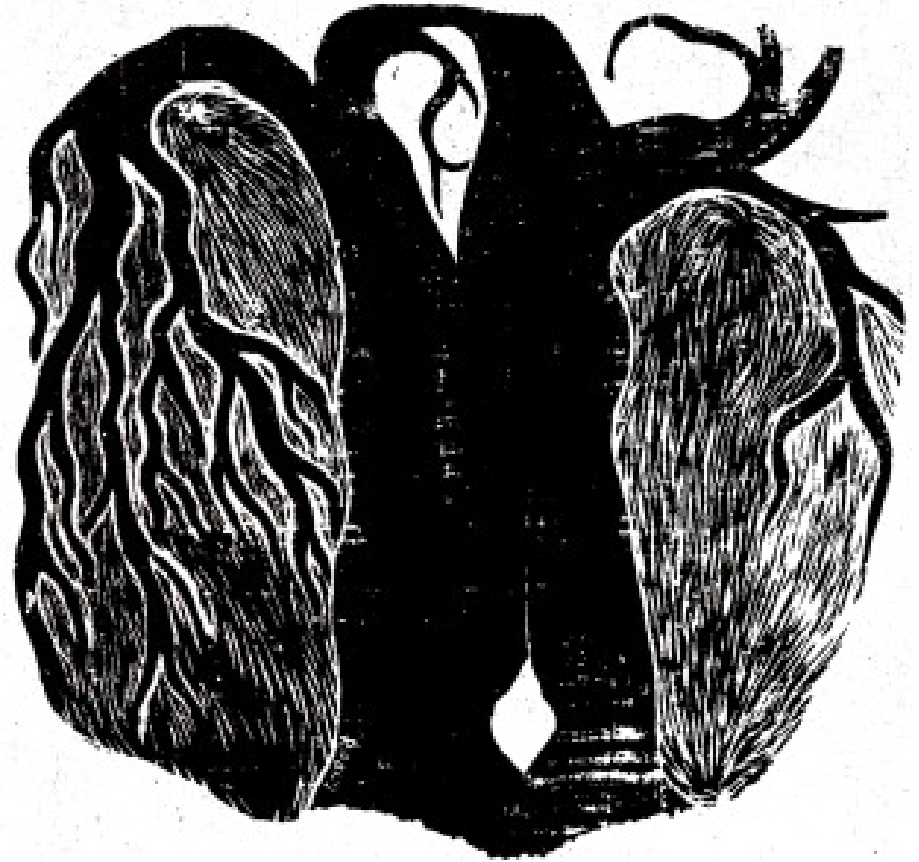


What vision should inspire gender relations in the 21st century? A new world order that would embrace full equality of opportunity between women and men as a basic concept. It would also eliminate the prevailing disparities between men and women and create an enabling environment for the full flowering of the productive and creative potential of both the sexes.

This new world order would promote more sharing of work and experience between women and men in the workplace as well as in the household. It would respect women as essential agents of change and development and open many more doors to women to participate more equally in economic and political opportunities. And it would value the work and contribution of women in all fields on par with those of men, solely on merit, without making any distinction.

The new world order would thus put people-both women and men-clearly at the centre of all development process. Only then can human development become fully engendered.

Human Development Report 1995



MODULE 6

ENGENDERING ORGANISATION STRUCTURE, CULTURE AND LEADERSHIP

Module 6
**GENDER ISSUES IN ORGANISATION
STRUCTURE, LEADERSHIP AND CULTURE**

Objectives

- *To understand gender issues in organisation structure, leadership and organisation culture.*
- *To understand different approaches to engendering the same.*

Materials

- *Charts*
- *Handout 6.1*
- *Handout 6.2*
- *Handout 6.3(Alternative 3)*

Time

Two hours



Methodology

Alternative 1

1. Introduce the objectives of the session.
2. Brainstorm in plenary on the different dimensions of leadership, structure and culture (Handout 6.1).
3. Divide the participants into three groups.
4. Ask the second group of participants to sculpt the first group of the participants into a gender blind organisation structure, leadership and culture tableau.
5. Request the third group to interpret the second group's sculpture, and then ask the second group to share any additional points on what they were trying to communicate through the sculpture.
6. Now ask the third group to change the sculpture, and make it gender sensitive (in particular redistributive).
7. Ask the second group to interpret the changes made, and ask the third group to share any additional points on what they changed in the organisation structure, leadership and culture.
8. Ask the first group of participants, what they felt being 'objects' for sculpturing by others. Also request them to comment on how the changes from gender blind to gender sensitive organisation structure, leadership and culture can be brought about.
9. Conclude with a discussion on additional points (in addition to what has emerged from sculpturing) from their own experiences on different ways in which organisation structure, leadership, and culture reflect gender hierarchies, and how these can be changed towards a more gender sensitive direction. (Use Handout 6.1, 6.2)

Alternative 2

1. Introduce the objectives of the session.
2. Brainstorm in plenary on the different dimensions of leadership, structure and culture (Handout 6.1)
3. Divide the participants into organisation-wise groups.

4. Ask each organisation-wise group to do three things: i) Rate their organisation structure, leadership, and culture on a scale of 1 -5, with five being gender-redistributive, and 1 being gender blind, ii) Give reasons for their rating, iii) Discuss strategies to make their organisation structure, leadership and culture more gender aware.
5. Ask each group to present their analysis in the plenary.
6. Conclude with any additional points (to the group presentation) on different ways in which organisation structure, leadership, and culture reflect gender hierarchies, and how these can be changed towards a more gender sensitive direction. (Use Handout 6.1, Handout 6.2)

Alternative 3

1. Introduce the objectives of the session.
2. Brainstorm in plenary on the different dimensions of leadership, structure and culture (Use Handout 6.1).
3. Mark three spots in the training hall, on three different sides: Agree, Partially Agree, Disagree.
4. Read out statements in Handout 6.3, one at a time on leadership, structure and culture, and ask the participants to choose whether they agree, partially agree or disagree with the same.
5. Initiate an eight minute debate on each statement between the different groups in each spot, beginning with the “agree” and “disagree” groups. If there is unanimity in choice, and the choice is appropriate, move to the next statement. If however the unanimous choice is not appropriate, share other points of view; but do not force these view points.
6. Proceed till all/most statements are finished. If time is a constraint ensure that some statements covering all three (leadership, structure and culture) aspects are covered.
7. Wherever the statement is gender blind, initiate a discussion on how changes have been (or can be) brought about to a gender redistributive situation (Handout 6.2 and 6.3).

Essential reading for the facilitator

_____. (1996), *Gender and Development, Gender Training Manual Series*, Volume III CEDPA, 1996, Handout 7E1
 Mukhopadyay, M. G. Steehouwer, F.Wong (2006), *Politics of Possible: Gender Mainstreaming and Organisational Change: Experiences from the Field*, Chapter 1, KIT/Oxfam.



GENDER ISSUES IN ORGANISATION LEADERSHIP, STRUCTURE AND CULTURE AND STRATEGIES FOR CHANGE

1. The term ‘Organisation Structure’ refers to the ways in which an organisation:
 - Divides its labour into distinct units and tasks
 - Achieves co-ordination among the different units and tasks
 - Divides responsibility for decision making (policy, managerial, and operational)
 - Ensures accountability
2. Leadership is the process of setting direction (policy and managerial) to an organisation and influencing people to follow that direction. Leadership style of an organisation can be autocratic, democratic or laissez faire (hands off).
3. Organisational culture refers to relatively uniform and enduring values, beliefs, and practices that are uniquely shared by organisational members and which are transmitted from one generation of employees to the next.
4. Gender issues in organisation structure could include the following:
 - Allocation of policy and managerial decision making solely or mainly to men, and operational decision making to women and men.
 - Allocation of programmatic tasks within the organisation in a stereotypical manner. For example, allocation of coordination of health, nutrition, and education programmes to women staff, and agriculture, industrial training, and forestry programmes to men staff.
5. Gender issues in leadership could include:
 - Allocation of administrative tasks within the organisation in a stereotypical manner, like allocation of finance management to men staff, and secretarial work to women staff.
 - Allocation of tasks between women and men staff in such a manner that women staff are over burdened.
 - Vesting of responsibility for institutionalising gender with an advisory gender focal person rather than the division coordinators incharge of implementation.
 - Absence of structures of accountability to women and marginalised men from the community, field workers (where a majority of women staff are located), and members of the autonomous women’s movement.
5. Gender issues in leadership could include:
 - Following a ‘masculine’ (‘autocratic’) model of setting direction and influencing staff to follow the same.
 - Following a ‘laissez faire’ approach to leadership, with no direction or steering.
 - Mixing household membership (of the leader) and organisational leadership positions.

- Not taking gender issues into consideration while taking policy, managerial and operational decisions- whether they pertain to programme or administration.
 - Leadership lacking gender perspective and being upto-date with concepts and practices
 - Gender insensitive role models of those in leadership roles.
6. Gender issues in organisation culture:
- The practice of replicating gender roles and stereotypes in informal processes of the organisation like vesting of responsibility for entertainment during organisational functions to women staff, and logistics to men
 - The practice of non delegation of important roles to women or not investing in their capacity building on the belief that they cannot deliver or that they will leave upon marriage.
 - The informal practice of permitting women staff to be addressed with lesser respect than that accorded to men staff in the same cadre.
 - The practice of cracking jokes that are stereotypical, or passing rude comments about women and men staff who do not adhere to social norms.
 - The practice of assuming male staff as the norm, and designing office infrastructure to suit men's height and weight.
 - The practice of not taking women's reproductive roles into account in organisation timings, as a result of which mainly single women join the organisation and leave when they get married (in contrast to majority of men staff who are married).
- The practice of allocating more office space to staff at leadership levels (dominated by men), and very little for field staff (dominated by women).
7. The process of engendering structure, leadership and culture can take place in different contexts discussed below, each demanding different strategies:
- When the Chief Functionary himself/herself desires to bring about gender redistributive changes, the process of transformation can be initiated through 'gender infrastructure' and an 'organisation change' approach.
 - When the Board, funding agency, or staff in non leadership levels desire to foster gender redistributive change, but the Chief Functionary is not particularly interested, the process of change is more difficult to bring about. In this context, in addition to the 'gender infrastructure', 'organisation change' approach, 'institutional approach' is very important- wherein pressure also comes from the broader social/women's rights movement, people's organisations and in worst instances the state.

Source:

_____, (1996), *Gender and Development, Gender Training manual series*, Volume III CEDPA, Handout 7E1.

Mukhopadyay, M, G. Steehouwer, F.Wong, (2006), *Politics of Possible: Gender Mainstreaming and Organisational Change: Experiences from the Field*, Chapter 1, KIT/Oxfam.

Inputs from Anil Choudhary, Peace, in Organisation Development workshops co facilitated by him.

CHECKLIST ON INSTIUTIONALISING GENDER PERSPECTIVE IN ORGANISATION STRUCTURE, LEADERSHIP AND CULTURE

Institutionalising gender in organisation structure

1. Does the organisation have a policy on maintaining gender/caste/social equity in governance (Governing Board) and management postings?
2. Does the organisation have equal or more number of women and men on the board and in management positions?
3. Does the organisation allow for field staff representation in the Board? Does the organisation have a policy of allowing for community representation on the board?
4. Does the organisation have a policy on posting men and women in non-traditional thematic or functioning posts? Does it practice these policies?
5. Does the organisation allocate roles and tasks in such a manner that there is equitable sharing of work burden between women and men staff?
6. Has a Gender and Development Task force been constituted consisting of coordinators of different divisions, and representatives from field level?
7. Is there an Advisory Panel consisting of women's rights activists, who do an yearly gender audit of the organisation with the task force?

Institutionalising gender in leadership

8. Are all policy and managerial decisions taken after giving consideration to gender issues?
9. Is the leadership function distributed amongst members who are not related to each other?
10. Is the leadership of the organisation democratic, inclusive and deliberative, without being laissez faire?
11. Do leaders act as a role model on gender, and are upto date with gender concepts and experiences across the world?

Institutionalising gender issues in organisation culture

12. Does the office layout, space and infrastructure available reflect a gender and democratic perspective?
13. Does the organisation respect diversity within the organisation?
14. Do annual reports and progress reflect a gender perspective?
15. Are the jokes, dress codes, and interaction in the organisation free of gender biases?
16. Do informal norms on who should look after guest reflect gender sensitivity? (for example, encouraging male staff to serve tea and look after guests).

17. Does the organisation have faith in the ability of women staff to deliver and continue in their job (and hence investment is made in building their capacities), or are they recruited to portray a public gender face?
18. Do modes of address by junior staff (of seniors) or vice versa reflect gender sensitivity?
19. Does the organisation recognise the socially assigned responsibilities of women staff, and design the working hours and transport accordingly? Does it attract married women staff in equal proportion to married men staff?
20. Do the staff protect and promote women's rights in their personal lives (like not giving and taking dowry, sharing household responsibilities and child care etc).

Adapted from

_____, (1996), *Gender and Development, Gender Training manual series*, Volume III CEDPA, Handout 7E1.



STATEMENTS ON ORGANISATION STRUCTURE, LEADERSHIP AND CULTURE

Structure

- Health is a gender specific theme, hence health programmes should be led by women staff. (Disagree)
- We have recently shifted from fixing responsibility for institutionalising gender on a ‘Gender Focal Person’, to a ‘Gender Task Force’ consisting of the coordinator of each programme and region. We consider this a more effective structure for gender institutionalisation. (Agree)
- Our organisation structure is flat, and fluid with roles being flexible. We do not take any donor funds, but take donations locally. We work as a collective, with a coordinator being appointed for each weekly meeting. We are hence a gender sensitive organisation. (Partially agree)

Leadership

- Though only 20% of the Board members are women, each policy decision in our Board is debated from a gender lens. Hence our organisation is gender aware. (Partially agree)
- Our organisation is headed by a woman leader of considerable repute. She founded the organisation fifteen years back, and has continued heading it with great efficiency. She is grooming her daughter to take over leadership of the organisation, and not her son! Our organisation is hence gender sensitive. (Disagree)
- All managerial decisions are taken by a core team consisting of senior staff (of whom 50% are women) and representatives of field staff (a majority of whom are women). Each issue is debated from a gender lens before reaching a consensus (Agree)

Culture

- Like in society, in organisations too when community level mega-fairs happen women staff should look after the soft aspects. (tea, garlands, reception etc.) while men staff should look after logistics. (Disagree)
- Our organisation takes into account reproductive roles of women in their work schedule, space and timings. We give three months maternity leave for women, and three days of paternity leave for men. We are of course gender sensitive. (Partially agree).
- Our organisation places value on learning and innovation in whatever we do, and being upto date with thinking and practices on gender from across the developing world. We consider ourselves gender sensitive. (Agree)





The basic discovery among any people is the discovery of the relationship between its men and its women.

Pearl S. Buck



MODULE 7

GENDER AND HUMAN RESOURCE DEVELOPMENT

Objective

- To understand the definition and different elements of Human Resource Development (HRD).
- To understand gender issues in HRD in the context of NGOs.
- To develop skills to prepare an equal opportunity plan in the context of NGOs and engender job descriptions, staff capacity building plan, and performance evaluation system.
- To be familiar with strategies to engender HRD processes of an NGO.

Materials

- Charts and markerpens
- Cards of 8 different colours
- Handout 7.1
- Handout 7.2
- Handout 7.3

Time

Two hours 30 minutes

Methodology*Alternative 1*

Pre session preparation - Ask participants to read Handout 7.3, 7.4 and 7.5 overnight.

1. Introduce the objectives of the session.
2. In the plenary, ask participants what they understand by the term Human Resource Development (HRD) and what do they know about different elements of HRD.
3. Sum up what HRD means (point 1, Handout 7.1) and different elements of HRD (evolving job description, job analysis, compensation analysis, evolving working relations, recruitment of staff to fit the job, induction into organisation, retention and development of staff, attrition of staff, and performance evaluation of staff)
4. Divide the participants into buzz groups of three participants, giving each group one-two elements of HRD, and ask them to explore gender issues vis-à-vis each element. Ask each buzz group to use cards of one colour for recording gender issues in each element.
5. Ask each buzz group to present, and others to add on if they have any comment. Add if any issue in the Handout 7.1 is left out. Again use cards of one colour for each element.
6. Explain that two important strategies for engendering HRD systems of an organisation are to put in place an equal opportunity plan with regard to access of women candidates (in particular from marginalised communities) to recruitment, retention, capacity building, and promotion opportunities. The other is to integrate gender concerns within different HRD elements. Use Handout 7.2 to discuss the different aspects to be considered within both the strategies.
7. Divide the participants into groups of five. Ask each group to analyse the organisation profile, job description and capacity building, and performance evaluation format given the previous evening (Handouts 7.3, 7.4 and 7.5- three exercises), and discuss strategies to engender the same through equal opportunity plan and development of gender sensitive job description and performance evaluation system. If time is a constraint, give one exercise per group.
8. Ask each group to present on one topic in plenary, and other groups to add. Bring in additional perspectives using Handout 7.2.
9. Deliberate in plenary on strategies to bring about gender sensitive changes in HRD systems and process of an organisation (Handout 7.1).

Alternative 2

Pre workshop preparation: Ask participants to send the following details of their organisation:

- Gender composition of staff at leadership, managerial and grass roots levels.
- Gender composition of staff across sectoral posts (agriculture, health etc).
- Compensation policies (if not available, compensation practices) with regard to staff at different levels and across different sectoral posts.
- Recruitment policies and procedures.
- Capacity building policies, if any.
- Job descriptions, if any.

1-6. Follow steps 1-6 of Alternative 1

7. Divide the participants into organisation-wise groups. Ask each group to analyse the staffing profile, job description and capacity building, and performance evaluation systems and process of their organisation, and discuss strategies to engender the same through equal opportunity plan and development of gender sensitive job description, job analysis, and performance evaluation system.
8. Ask each group to paste their chart on the wall. Give twenty minutes time for participants to walk around and read each organisations' charts.
9. Ask participants to come back to plenary, and ask for clarifications on any of the charts.

10. Deliberate in plenary on strategies to bring about gender sensitive changes in HRD systems and HRD process of an organisation of an NGO.

Essential reading for the facilitator

_____, (1996), *Gender and Development, Gender Training Manual series*, Volume III CEDPA.

Murthy R.K. and N. Rao, (1997) , *Addressing Poverty: Indian NGOs and their Capacity Enhancement in the 1990s*, Friedrich Ebert Stiftung (India office) New Delhi.



GENDER ISSUES IN HUMAN RESOURCE DEVELOPMENT AND HUMAN RESOURCE DEVELOPMENT STRATEGIES

1. In corporate parlance, human resource development refers to effective use of human resources in order to enhance organisational performance. In the context of NGOs, human resource development can be seen as effective recruitment, use and development of human resources in order to achieve the NGO vision and mission.
2. The different elements of HRD include evolving job description, job analysis (analysis of skills, knowledge and capacities to do the job), compensation analysis, evolving working relations, recruitment of staff to fit the job, development of staff, attrition of staff, and performance evaluation.
3. Common gender issues in job description, job analysis, and compensation analysis/package in the NGO sector include:
 - Excluding gender expertise from job description of most posts, other than those that are seen as women-specific or women intensified like Women's Coordinator, Gender Coordinator and Health, and Child Care Coordinator.
 - Excluding gender concerns of men from marginalised communities and sexual minorities from job descriptions.
 - Undervaluation (including market based valuation) of skills and knowledge required for sectors and tasks that women staff do within a gender based division of work within the organisation.
 - Excluding women staff from certain benefits like health reimbursement for parents, on the belief that it is only sons who look after parents.
4. Common gender issues in recruitment include the following:
 - Not paying minimum wages for staff at field level where women dominate, and disparity beyond government pay scales between salaries and perks of those at leadership and field level.
 - In the job advertisement making it clear that men (drivers, watchperson) or women (e.g. sweeper, cook, Gender Coordinator) are preferred for the post.
 - Putting advertisements in places where women candidates have lesser access (e.g. internet, more internet users are men than women in rural areas).
 - In the advertisement, emphasising education requirements far above what is required for the job¹
 - In the interview, assuming that men or women alone are suitable for the post.
 - Lack of gender sensitivity and gender expertise of the interview panel.
 - Asking non-job related gender specific questions to women candidates like plans for marriage, plans for having children, whether husband will allow her to work etc.
 - Placing more value on women candidates' looks or marital status (giving preference to single women) than competencies during recruitment.
 - Holding interviews of candidates late into the evenings.

¹ As there are biases against women in access to secondary and tertiary education, placing education requirements above what is necessary for the job discriminates against women candidates, in particular those from dalit, minority and tribal communities.

5. Common gender issues in working relations and standards include:
 - Assuming men- without much reproductive work- as the norm for evolving working days, working hours, timings (full day with no flexibility), and working space.
 - Not taking gender based violence against women staff and safety issues into account during night meetings.
 - Moral policing - leaders of NGOs pulling up women and men staff for becoming friends with each other.
 - Lesser access to office vehicles and office space for staff at lower levels, and soft sectoral posts wherein women dominate.
 - Excluding single women from maternity benefits, on the belief that women outside marriage should not be encouraged to have children.
 - Excluding women and men staff who have chosen to adopt children from maternity/paternity benefits.
 - Ignoring sexual harassment at work place, and not ensuring safety at work place.
 - Lack of attention to women staff's practical sexual/gender needs like rest rooms with breast feeding spaces, separate toilets, sanitary napkins, child care facilities etc.
6. Common gender issues in development of staff include the following:
 - Providing gender sensitisation training to only women staff; and sending women staff alone for gender training outside.
 - Providing gender sensitisation training to men and women staff; but not providing specialised gender training as related to job description.
 - Providing gender sensitisation training only to staff at particular levels (managerial, middle or field).
 - Giving priority to men staff in opportunities for training on non-gender issues.
 - Arranging training programmes for a duration (15 days and above) and during a time (children's examination time) that is not convenient for women staff.
 - Giving priority to men over women middle level staff for management training, on the assumption that they are more likely to continue in the organisation; and move to managerial levels.
7. Common gender issues in performance evaluation and attrition of staff:
 - Ignoring issues of gender sensitiveness (organisational, community and personal) and gender expertise in performance evaluation systems.
 - Placing great value on hours of work and ability to come during weekends in performance evaluation.
 - Performance evaluation only by those at higher levels (where men dominate), and not by self, peers, and those reporting to the person (where women dominate).
 - Giving preference to men staff and single women during attrition of staff (if the organisation has to downsize), as they are assumed to work longer hours.

8. Two common strategies for engendering HRD systems and processes in an organisation are:
 - Putting in place an equal opportunity plan and monitoring system with regard to recruitment processes (including affirmative action), compensation analysis, working standards, human resource development, performance evaluation and attrition of staff (reversing all the gender issues highlighted in points 3-7 would help in evolving an equal opportunity plan). See handout 7.2 for more details.
 - Engendering job description, job analysis, recruitment, human resource development, performance evaluation and attrition systems (reversing all the gender issues that are not highlighted in points 3-7 would help in the process of engendering) See handout 7.2 for more details.
9. Engendering human resources should ultimately be the responsibility of the Chief Functionary of the organisation. One staff at managerial leadership level may be appointed for coordinating HRD functions (in the case of a large organisation) or vest this coordination function with an existing staff at management level (small organisation). The job description of the HRD person should include institutionalisation of gender concerns within HRD functions.

Adapted from

_____, (1996), *Gender and Development, Gender Training Manual series*, Volume III CEDPA, Handout 7E1.

Murthy R.K. and N. Rao (1997), *Addressing Poverty: Indian NGOs and their Capacity Enhancement in the 1990s*, Friedrich Ebert Stiftung, (India office) New Delhi.





CHECKLIST ON INSTITUTIONALISING GENDER IN HUMAN RESOURCE DEVELOPMENT

Job description, job analysis and compensation assessment:

1. Are gender and social equity specific responsibilities integrated into job description related to each post, as appropriate?
2. Are gender concerns of particular groups of men and men from marginalised communities integrated into job descriptions related to each post?
3. Are skills and knowledge required for sectors and tasks where women staff dominate valued as much as those where men dominate?
4. Are legal norms followed with regard to minimum wages, and salary differences between those at different levels?
5. Are compensation packages free of gender biases (benefits for parents, adoption etc.)?

Recruitment

1. Do the job advertisements go through channels that potential women candidates can access? Is it mentioned that preference would be given to women candidates, in particular from marginalised groups?
2. Is it ensured that there are no open gender biases asking candidates of a particular gender not to apply?
3. Is there an affirmative policy in recruitment in favour of women (and other marginalised groups)? That is, all things being the same, is preference given to the woman candidate?
4. Do members of the selection board have a gender perspective, and does the selection criterion include gender sensitivity, skills and knowledge as related to the post?

5. Do the members of selection board avoid gender insensitive personal questions like plans to get married, have a child etc.?
6. Are interviews held at a time (season and daily timings) and place suitable to women candidates?
7. Are recruitment outcomes appropriate and gender sensitive? Are the number of women and men staff adequate vis-à-vis the programmes planned? Do women constitute at-least 50% of the staff? Is gender composition of staff changing in favour of women at leadership levels?

Working relations and standards

1. Is there a policy of flexible working hours and flexible working space for staff with young children?
2. Is there a rest room and breast feeding room available for pregnant and lactating women respectively?
3. Is there a separate toilet available for women staff, with adequate water, emergency sanitary napkins, dustbins etc.?
4. Is a day care center available for staff with young children?
5. Do women staff at every level have equal access to vehicles and office equipments as men staff?
6. Is minimum legal maternity leave¹ provided by the organisation, as well as a minimum of a month of paternity leave for both natural and adopted children, with checks to make sure that men do look after the children, wife, and housework?
7. Are single mothers and fathers eligible for maternity and paternity leave?
8. Is safety of women staff ensured at work place and in the community?
9. Is there a policy on sexual harassment at work place, and is it effectively implemented?

¹ Three months in India.

Staff development

1. Do all staff, irrespective of gender and levels, have access to, and take part in, gender sensitisation programmes?
2. Do all staff have access to specialised gender training as related to the posts that they occupy?
3. Is there gender equity in access to training opportunities on non gender specific topics?
4. Is there gender equity in access of middle level staff to managerial training, seen as necessary for promotion?
5. Are training programmes held at a place and for a duration convenient to women staff?
6. Is there equity in promotion outcomes?

Performance evaluation

1. Are issues of gender sensitiveness (organisational, community and personal) and gender expertise integrated into performance evaluation systems?
2. Are issues that go against women staff (e.g. number of hours put in) and are not essential to effectiveness excluded from criteria used for performance evaluation?
3. Is performance evaluation by self, peers, higher ups, and those reporting to the staff encouraged?
4. Is attrition of staff purely based on assessment of (in) effectiveness of staff? (and not gender or marital status)?

Adapted from

_____, (1996), *Gender and Development, Gender Training manual series*, Volume III CEDPA, Handout 7E1.

Murthy R.K. and N. Rao, (1997), *Addressing Poverty: Indian NGOs and their Capacity Enhancement in the 1990s*, Friedrich Ebert Stiftung, (India Office), New Delhi.



EXERCISE ON PREPARING AN EQUAL OPPORTUNITY PLAN

Using the data below prepare an equal opportunity plan

Staff composition across levels

Level of staff	Men staff	Women staff	Total
Leadership/ Senior Managerial	5	1	6
Middle managerial	7	3	10
Field level/Lower Administrative	10	20	30
Total	22	24	46

Staff composition across sectors

Sector /Task	Men staff	Women staff	Total
Agriculture	3		3
Health		3	3
Education	1	2	3
Forestry	1		1
Non farm livelihood	2		2
Community organisation	8	14	22
Finance and accounts	2	1	3
Coordination	1		1
Administration	1	3	4
Office Assistant	1		1
Cleaner		1	1
Driver	2		2
Total	22	24	46

Vacancies:

Non farm livelihood (leadership level): 1

Assistant coordinator: 1

One driver plans to leave

Other information:

- Women applicants for post of agriculturist (when recruited last year) was 15% of total applicants. Candidate selected: Man
- Majority of women staff are single
- Four staff left last year, of whom three were women (two married).
- Reason for exit of married women staff: long working hours, four days a week of late night meetings, one was nursing her child, absence of help at home for child care
- Reason for exit of a young unmarried women staff: Case of harassment by senior, her family refused to allow her to continue, and in two months got her married off.



EXERCISE ON ENGENDERING JOB DESCRIPTION

Job Description of Director

- To facilitate strategic planning of the organisation
- To meet statutory requirements with government
- To prepare proposals and send progress reports to donors
- To organise board meetings, and place all issues before them for approval
- To be accountable- to ensure that plans of the organisations are fulfilled effectively
- To supervise the work of the second line staff of the organisation- programme and administration.

Job Description of Health Coordinator

- To carry out operational planning of the health programme
- To supervise the health workers to implement the programme
- To liaise closely with government and ensure that the government doctors attend health camps organised in the village
- To coordinate social marketing of contraceptives through women SHGs
- To monitor that the plans for the year are achieved with regard to the health programme
- To prepare progress reports and submit to the Director on the health programme

Job Description of Environment Specialist

- To conduct operational planning of the environment programme
- To carry out environmental impact assessment of all income generation programmes and interventions proposed by the NGO, and submit the report to the Director (approving it/rejecting it, making it more environmentally sensitive)
- To render consultancy services to government and corporate sector on environmental impact assessment
- To monitor that the plans for the year are achieved with regard to the environment programme
- To develop environmental impact assessment tools, and keep updating these
- To prepare progress reports and submit to the Director on the environment programme

EXERCISE ON ENGENDERING PERFORMANCE EVALUATION FORMAT

Name of the Employee being reviewed: _____
 Post occupied: _____
 Reviewer’s Name: _____
 Date: _____
 Review Period: _____

Rating Scale :

NA = Not Applicable

1= Unsatisfactory

Does not perform required tasks. Requires constant supervision

2= Marginal

Needs improvement in quality of work. Completes tasks, but not on time.

3= Meets requirements

Meets basic requirements. Tasks are completed on time.

4= Exceeds requirements

Goes above and beyond expectations.

5= Exceptional

Always gets results far beyond what is required.

Briefly give the job description for the post:

Briefly describe a few set goals vis the person. Were the goals achieved? What were the constraints faced- interna/ external, if the goals were not achieved, then why not?

Attributes Related to Tasks

Achieves set objectives, without caste and gender	NA	1	2	3	4	5
Open to constructive criticism	NA	1	2	3	4	5
Demonstrates required job skills and knowledge	NA	1	2	3	4	5
Completes all assigned responsibilities	NA	1	2	3	4	5
Meets attendance requirements	NA	1	2	3	4	5
Takes responsibility for his/her actions	NA	1	2	3	4	5
Recognises potential problems and develops solutions	NA	1	2	3	4	5

Demonstrates problem-solving skills	NA	1	2	3	4	5
Offers constructive suggestions for improving work	NA	1	2	3	4	5
Generates creative ideas and solutions	NA	1	2	3	4	5
Provides alternatives when making recommendations	NA	1	2	3	4	5
Communicates effectively	NA	1	2	3	4	5
Works amicably in a team	NA	1	2	3	4	5
Investes in own personal goals for improvements	NA	1	2	3	4	5

Additional comments on specific parameters:

Suggestions for Employee Development Supported by Target date

	Supported by	Target date
1.		
2.		

Over all observation and comments by Immediate Supervisor/Manager:

Employee Signature

Supervisor Signature

Date

Date

Source:

Contribution of Team Members of Catalyst Service International, Bangalore



MODULE 8

**GENDER BUDGETING
IN THE CONTEXT OF NGOS**

Module 8
GENDER BUDGETING IN THE CONTEXT OF NGOS

Objective

- *To understand the need for gender analysis of budgets.*
- *To understand steps in analysis of budgets from a gender lens.*
- *To develop skills in analysis of NGO budgets from a gender lens.*
- *To revise an NGO budget from a gender lens.*

Materials

- *Two sets of 60 cards each of two different colours*
- *Chart paper*
- *Calculator for each group*
- *Handout 8.1*
- *Handout 8.2 (Alternative 1)*
- *Handout 8.3 (Alternative 2, to be collected from participating organizations two weeks before the workshop)*

Time required:

Two hours 30 minutes.

Methodology

Alternative 1

1. Introduce the objectives of the session,
2. Ask participants if they think gender analysis of budget is required, and why.
3. Sum up why gender analysis is required (discussion points 1-2, Handout 8.1) and provide a definition of gender analysis of budgets (discussion point 3, Handout 8.1).
4. Distribute two sets of two cards each of different colours, ask the participants what aspects should be kept in mind in gender analysis of expenditure, and gender analysis of benefits.
5. Using points emerging from the cards, and additional ones, sum up aspects that need to be kept in mind during analysis of budget from a gender lens (discussion point 5, handout 8.1) and aspects that need to be kept in mind during analysis of benefits (discussion point 8, Handout 8.1).
6. Divide the participants into groups of five, and give each group the mock data as a budget (or anticipated expenditure) and benefits of an NGO (Handout 8.2). Ask the groups to analyse the budget and anticipated benefits from a gender lens, and record their response using Handout 8.2, columns 6-8 Table on programmes, 5-6 Table on administration).
7. Following presentation, pull out the different ways the budget and anticipated benefits were gender biased. Discuss strategies for engendering the NGO budget and benefits given in the case study.
8. Conclude with a discussion on how gender analysis of government budget and strategies for engendering government budget may be different.

Alternative 2

Pre-workshop preparation: Ask participating NGOs to bring their budget and anticipated programme benefits with required gender disaggregated data.

1. Follow steps 1-5 of Alternative 1
2. Divide the participants into groups consisting of people from the same organisation, and ask them to analyse their organisational budget and anticipated benefits from a gender lens. Also ask them to brainstorm how they would engender the budget and benefits.
3. Following presentation, pull out the different ways the budget and anticipated benefits were gender sensitive or gender biased. Discuss strategies for engendering the budgets and benefits further.
4. Conclude with a discussion on how gender analysis of government budget and strategies for engendering government budget may be different.



RATIONALE FOR, AND STEPS IN, GENDER BUDGETING

A. Gender budgeting: Development organisations

1. The Beijing Platform for Action (1995) calls for governments to systematically review how women benefit from public sectors, adjust budgets to ensure equality of budgets to public sector expenditures (paragraph 346 BPFA). This call is equally applicable to NGOs.
2. There is at times a gap between government and NGO policies to further gender equity and progress made towards the same, due to the fact that the allocation of funds does not adhere to principles of gender equity.
3. Gender budgeting is a tool to ‘follow the money’ so as to monitor if government and NGO rhetoric in terms of gender equity or women’s empowerment, commitments made in international conferences, and human rights treaties are backed by the resources required. The ultimate objective of gender analysis of budgets is to influence expenditures from a gender lens.
4. Pioneering work on gender budgeting started in late 1980s in Australia, and mid 1990s in South Africa, and in certain Commonwealth countries.
5. Budgets can be analysed from a gender lens in several ways:
 - Budget targeted exclusively at women by government or NGOs to meet their specific needs and interests. For example, budget for Mahila Samakhya programme under Human Resource Development Ministry, and budget for strengthening women’s collectives by NGOs.
 - Budget for schemes that are likely to benefit both men and women, but have quotas for women. An example is budget on government sponsored SGSY scheme, with a quota for women, or food for work relief schemes by NGOs, with a quota for women.
 - Budget on schemes or programmes that are likely to benefit both men/boys and women/girls, but differentially. For example, comparing who (girls/boys) are the users of primary education, secondary education, and tertiary education, with how much proportion of budget goes for each.
 - Budget on schemes or programmes that are likely to benefit women more than men like child care, water supply, fuel wood security etc.
 - Budgets on programmes targeted at men, but towards changing dominant gender attitudes and norms, as well as behaviours that are detrimental to them and to their women relatives. The whole of this budget may be taken to benefit women in the long run.
 - Budgets on programmes targeted at sexual minorities etc.
 - Budget on special efforts to promote gender equity within NGOs or government departments for their employees (does not include women staff salary). Example: expense on child care facilities, maternity leave, paternity leave, training for staff at lower levels where women predominate.
 - Budget on staff salaries, staff allowances and staff amenities, and analysis of how much of it goes to women and men staff.
6. Analysis of all the above aspects may give an idea of how far the budget is gender sensitive. Analysis over time, may give an idea of whether gender sensitivity has increased or decreased.

B. Additional points to be kept in mind during gender budgeting of NGOs

1. An additional tool that could be used while analysing NGO budgets is to see how much benefit men and women may potentially derive (using past experience) if the budget amount is spent. This is also possible in the case of government budgets, but national level studies on impact are rare to find for any programme. The benefits may be in terms of:
 - Days of employment created
 - Days of employment protected (e.g., through decrease in violence)
 - Wages and incomes generated
 - Value of other labour benefits created (e.g., claiming of maternal benefit)
 - Expenditures saved
 - Computation of value of increase in food securityHowever, many things like bodily integrity and self confidence are difficult to place value on.

2. While engendering NGO budgets it is important to:
 - Increase allocation to women specific programmes, and ensure that majority of benefits of this allocation goes to women (that is women are not conduits of funds to men).
 - Within general programmes, to increase proportion of benefits going to women to a minimum of 60%.
 - Increase budget for general programmes that benefit women more than men (struggles around rights to basic needs).
 - Increase proportion of women at higher levels of the organisation.
 - Reduce salary discrepancy at the same level based on undervaluation of women's work. e.g. paying Health Coordinator (often a woman) less than Agriculture Coordinator (often a man).

- Reduce salary differential between staff at lower levels (where women staff are concentrated) and higher levels (where male staff are concentrated).
- Increase access of women staff to office vehicles and equipments.
- Ensure that when income is generated for the NGO through income generation, the burden of this is not inequitably borne by women

3. Gender Analysis of NGO budgets is at a preliminary stage in India. It is important that NGOs not only engender their objectives, and evolve gender specific programmes, but also mainstream gender into general programmes and struggles, budgets and revenue generating strategies. Gender focal persons or gender task forces are necessary, and they must find allies in the Board and senior level staff of the organisation to engender budgets. A training for Board and senior management on gender and gender budgeting may be a good starting point.



C. Additional points to be kept in mind during gender budgeting of government

1. In the case of the government, gender sensitivity of its revenue generation strategies needs to be given as much emphasis as gender analysis of budgets. The revenue generation strategies includes
 - Taxation: direct income tax, indirect tax (e.g. VAT, excise and customs), and tax expenditures (e.g. tax incentives and rebates)
 - Donor funds: Loans and grants, some tied and some untied
 - Other revenues: user fees, asset sales and borrowingUser fees for services may affect women's access to services more than men, tax subsidy for savings for retirement benefit men more than women (as they are more likely to have been in formal employment) etc. Hence analysis of revenue generation may reveal who benefits and who loses through the revenue generation mechanisms.
2. The Ninth Plan of the Indian Government made a commitment of allocating 30% of its budget for women's development schemes through 'Women's Component Plans' within each department.
3. Against this commitment a preliminary study of the budget of the Government of India 2000-2001 shows that only 6 of 45 Ministries actually have schemes exclusively aimed at women, and the budgets that directly focus on women constitute only 1% of the total budget. There are, however, a number of schemes in various Ministries and

Departments that have sub-components on women (clubbed with others like special schemes for SCs, STs and women under Ministry of Agriculture), and need to be disaggregated in terms of budgets and their impact on men and women (such data is as of yet not available). There are even a larger number of Ministries which so far do not have women components in their schemes, and these include almost all of the so called 'economic Ministries' such as the Ministries of Finance, Information Technology and, Commerce and Industry¹

4. A gender analysis of trends in budgets between 2000-2001 and 2001-2002² observed that 35 schemes can be considered women specific, of which 23 are located within the Department of Women and Child Development. While this budget increased by 18.2% between the two years, the bulk of the increase was on traditional schemes of the Department of Women and Child Development. Apart from increase in budget for training women for production and women's hostels, the bulk of the increase has been for women in special circumstances and schemes for children's welfare.
5. Thus gender analysis of government budgets in India is still at a preliminary stage. Gender analysis of revenue generation is yet to be attempted.

¹ Senapathy, Manju, (April 200), 'Government of India Budget 2000-2001 and Gender', Paper presented at the Inter-Agency Workshop on Improving the Effectiveness of Integrating Gender into Government Budgets organised by Commonwealth Secretariat, London.

² Kalyani Menon Sen and Seeta Prabhu (April 14, 2001), 'The Budget: A Quick Look through a Gender Lens', Economic and Political Weekly.

6. Advocacy strategy to engender government budget include:
 - a) Form ‘gender analysis of budgets’ committees at state and national level.
 - b) Prepare a gender sensitive budget and lobby for it before hand with the Ministry of Finance, National Commission on Women, and National Committee on Women’s Empowerment.
 - c) Analyse published draft budgets and lobby for changes with above organisations.
 - d) If the above fails, use public interest litigation when the budget goes against constitutional guarantees or international commitments that the government has agreed upon on gender equality.
 - e) Lobby for a list of non-negotiables on revenue raising mechanisms (like banning user fees for essential services).
 - f) Monitor if gender aware budgets are spent as planned.

Essential reading for the facilitator

International Development Research Center, *Progress of the world’s women 2000, Chapter 5: Accountability to the Progress of women*, IDRC, 2000 (www.bellanet.org/grbi/docs/progr-ww5.pdf)

Kalyani Menon Sen and Seeta Prabhu, (April 14, 2001), ‘The Budget: A Quick Look through a Gender Lens’, *Economic and Political Weekly*.

Senapathy, Manju, (April 200), ‘Government of India Budget 2000-2001 and Gender’, Paper presented at the Inter-Agency Workshop on Improving the Effectiveness of Integrating Gender into Government Budgets organised by Commonwealth Secretariat, London.



FACT SHEET ON AN NGO FOR BUDGET ANALYSIS

NGO Objective: Empowerment of small, marginal farmers, landless, women and fishworkers

Area of operation: 10 agricultural villages, 10 coastal villages

NGO Programme budget, participants and expected benefits

Line item (1)	No of units (2)	Per unit cost (3)	Gender details (4)	Expected increase in income/expected income (5)	Resources going to		Benefits		Total	
					W	M	M	W	M	W
					(6)		(7)		(8)	
1. Watershed development programme <ul style="list-style-type: none"> • Land development • Bunding • Checkdam • Gully plugs • Village development committee training 	7	Rs. 2,000/acre 400 acre per watershed Rs. 500/acre Rs. 40,000/watershed Rs. 4,000/watershed Rs. 3,000/watershed	90% land owners men 60% budget (other than training) for wages 60% workers men Women earn 70% of men's wages Women 35% of members of committee	Rs. 2,400/ acre/ annum increase in income						

NGO ADMINISTRATION BUDGET: TWO YEARS

Line item (1)	No (2)	Budget (3)	Gender details (4)	Direct benefits		Indirect benefits	
				M	W	M	W
				(5)		(6)	
Staff salary							
Director	1	Rs 15,000/month	Male				
Coordinators	3	Rs 10,000/month for watershed/fish workers, Rs 6000 for SHG programme	2 Male, one female (SHG)				
Field staff	10	Rs 2000/month	4 males, 6 females				
Driver	1	Rs 3000/month	Male				
Accountant	1	Rs 4000/month	Male				
Secretary	1	Rs 3000/month	Female				
Office boy	1	Rs 1500/month	Male				
Sweeper	1	Rs 1000/month	Female				
Allowances							
Travel		10% of salary per month					
medical		20% of salary per year					
Leave							
Maternity leave		3 months for women (2 children)	Female staff				
Paternity leave		7 days for men	Male staff				
Earned leave		15 days	All staff				
Casual leave		10 days	All staff				

Maintenance	No (2)	Budget (3)	Gender details (4)	Direct benefits		Indirect benefits	
				M	W	M	W
				(5)		(6)	
Jeep		Rs. 6,000 per month	70% used by Director, and 30% by coordinators				
Computer		Rs. 5,000 per annum per computer for two computers	<ol style="list-style-type: none"> 1. 70% used by Director, and 30% by coordinators 2. 50% by accountant and 50% Secretary 				
Communication: telephone, email, fax and stationary		Rs. 20,000 per month	<ol style="list-style-type: none"> 1. 70% used by Director, and 30% by coordinators 2. 50% by accountant and 50% Secretary 				



Theories of gender, with hardly an exception, focus either on one-to-one relationships between people or on the society as a whole. Apart from discussions of the family, the intermediate level of social organisation is skipped. Yet in some ways this is the most important level to understand. We live most of our daily lives in settings like the household, the workplace and the bus queue, rather than stretched out in a relation to society at large or bundled up in a one-to-one. The practice of sexual politics bears mostly on institutions: discriminatory hiring in companies, non-sexist curricula in schools and so on. Much of the research that is changing current views of gender is about institutions like workplaces, markets and media.

R.W. Connell



MODULE 9
**INSTITUTIONALISING GENDER
WITHIN ORGANISATIONS**

INSTITUTIONALISING GENDER WITHIN ORGANISATIONS

Objective

- *To become familiar with strategies to institutionalise gender within NGOs, which combine the infra-structural, organisational, and institutional approach*
- *To assess the degree of institutionalisation of gender within their own organisation, and reflect on which strategy could be appropriate for strengthening the process*

Materials

- *Handout 9.1, 9.2, 9.3*

Time

Three hours



Methodology

Part I

1. Introduce the objectives of the session.
2. Recall from Module 3 the need for combining the infrastructure, organisational, and institutional approaches to institutionalising gender within NGOs.
3. To introduce two possible ways through which such institutionalisation can take place (see Handout 9.1).
 - Following a predetermined ‘road map’ or ‘route’, which is determined in the beginning (the route strategy).
 - Following a path that unfolds as the process goes on, combines institutionalisation of gender and other social relations, locates institutionalisation of gender within overall organisation strengthening (the process strategy).
4. Break the participants into groups of five or six, and give them the case study of the ‘route’ approach and ‘process’ strategy (Handout 9.2 and 9.3). Ask each group to discuss the strengths and weakness of both the strategy.
5. Ask one group to present strengths of one strategy, and other groups to add on, and then ask the second group to present weakness of the same strategy, and other groups to add on. Follow the same process for the second strategy. Give additional inputs if necessary (use handout 9.1 if necessary).
6. Explain that the process of institutionalising gender within NGOs:
 - Can be donor driven or leadership driven.
 - Can be a single NGO initiative, or part of a multiple NGO initiative (normally donor driven).
 - Can be an internal process, or facilitated by external persons.
7. Emphasise the pros and cons of each of the above options (use Handout 9.1).
8. Emphasise that institutionalising gender within organisations takes time, and spans several years.

Part II

1. Divide the participants into organisation-wise groups.
2. Ask each group:
 - To analyse the degree of institutionalisation of gender within their NGO, at infrastructure, organisational process, and institutional levels.
 - Select either the route or process strategy to institutionalisation of gender, and elaborate on the stages that they would follow, and explain reasons for their choice.
3. Ask each organisation to put their presentation on a chart and paste it on a wall. Give half an hour for participants to walk and see what each organisation has put up.
4. Allow time in the plenary for clarifications on any NGO's chart.
5. Sum up stating that the process of institutionalisation of gender is likely to be different for different organisations, depending on organisational vision, history, leadership, culture of the area, donors funding them, and so on.

Essential reading for the facilitator

Mukhopadhyay, M., Stehouwer, G. and F., Wong, (2006), *Politics of the Possible, Gender Mainstreaming and Organisational Change, Experiences from the Field*, Netherlands: Royal Tropical Institute, and UK: Oxfam (summaries at the end of each chapter)



INSTITUTIONALISING GENDER WITHIN ORGANISATIONS

1. There are two strategies for institutionalising gender within organisations:
 - The ‘route’ strategy, which entails following a predetermined ‘road map’ or ‘route’, which is determined in the beginning (the route strategy).
 - The ‘process’ strategy, which entails following a path that unfolds as the process goes on, combines institutionalisation of gender and other social relations, locates institutionalisation of gender within overall organisation strengthening (the process strategy).
- 2a. One version of the ‘gender route’ strategy is the organisational gender diagnosis tool which was evolved by NOVIB, 1996 and entails self-analysis of gender mainstreaming in:
 - Three aspects: mission and mandate, organization structure, and human resource development.
 - With three respects: technical (systems and procedures), political (decision making and power), and culture level (organisational sub culture)

This leads to a ‘3 by 3’ matrix or nine cells. Gender institutionalising with regard to each of the nine cells is rated. Whichever cell is the most important to strengthen gender related functioning of the NGO is determined, and a route is made of either starting with a strong building block or weak one, and exit through the block which is the most important one.
- 2b. One could modify this ‘gender route’ to make it a rating of gender institutionalisation within infrastructure, organisational deep processes, and institutions.

Infrastructure (six components):

- Vision, mission and strategy
- Programmes and activities
- Planning, monitoring and evaluation systems
- Organisation structure
- Human resource development systems
- Budgeting

Organisational culture (two components):

- Values/beliefs
- Informal practices

Institutions with which the organisation works (five components)

- Household
- Markets
- Community
- State
- Inter-state

The modified gender route approach entails organisational self-diagnosis of gender institutionalisation within these 13 components, and evolving a map of where one would like to start and end, based on both ‘importance’ of intervening in that cell and ‘what is feasible’.

3. The ‘process’ strategy does not entail following a ‘route’ or ‘road map’. Normally, the process strategy emerges in response to an organisational crisis or imminent crisis, which may be solely gender related or part of a larger issue of lack of democratisation (collective and deliberative decision making), inclusiveness (including women and marginalised men) and accountability (including on gender). The process strategy responds to the immediate crisis or imminent crisis,

and then moves to other issues of institutionalisation of gender which emerge as the process unfolds. It examines gender institutionalisation along with institutionalisation of other social relations based on caste, class, religion, differential ability etc.

4. The pros and cons of the ‘route’ and ‘process’ strategy to institutionalising gender are listed in the table below.

Pros and cons of Route and Process strategy to gender institutionalisation

	Pros	Cons
Route strategy	Systematic Can be monitored Gender institutionalisation is the main thrust	Path less amenable to change Less amenable to institutionalising gender and social relations ¹ May not be suitable for crisis situations
Process strategy	Amenable to institutionalisation of gender and social relations Looks at gender in the context of overall strengthening of organisations The path can change as the process unfolds Suitable for crisis situations	Danger of ‘gender’ getting lost Difficult to monitor, as there is no yardstick

5. Both the ‘route’ and ‘process’ strategies to institutionalising gender can:

- Be donor driven or leadership driven
- Be externally facilitated or internally facilitated, or a combination of both
- Take place in a single NGO intervention, or simultaneously be initiated with multiple NGOs to promote mutual learning

¹ The rank for each of the elements may be different for gender institutionalisation and caste institutionalisation.

6. The pros and cons of donor vs. leadership driven, externally vs. internally facilitated, single and multiple NGO ways of institutionalisation of gender are given in the table below.

	Pros	Cons
Donor Driven Vs. Leadership driven	<p>Necessary when leaders not gender sensitive</p> <p>Can draw upon experiences from other countries and organisations</p> <p>Is owned by the organisation</p> <p>More likely that critical gender issues will emerge and be addressed</p>	<p>Process may not be owned by the NGO</p> <p>Gender issues within organisation may not be revealed relationship with donor is hierarchical</p> <p>Leadership, if gender biased, may not institutionalise gender at all</p> <p>Whether experiences from different organisations are drawn on depends on the facilitator</p>
External facilitation (non donor) Vs. Internal facilitation	<p>Can draw upon experiences from other countries and organisations</p> <p>Can bring about certain objectively</p> <p>If leader is gender sensitive, may bring to the institutionalisation agenda core gender issues</p> <p>The process is likely to fit with the organisation culture</p>	<p>May take some time to know the gender issues in the context of the organisation</p> <p>If not chosen carefully, may not fit within the organisation culture</p> <p>May be biased towards leaders' perception.</p> <p>May draw upon narrow conceptual frames and expertise</p>
Single NGO Vs. Multiple NGO Institutionalisation	<p>Is owned by the organisation</p> <p>More likely that critical gender issues will emerge and be addressed</p> <p>More cross learning of gender institutionalisation strategies across organisations</p> <p>A sense of competition may be good when the leadership is lethargic</p>	<p>Less cross-learning across organisations</p> <p>If leadership is lethargic, not much progress may happen</p> <p>Less ownership by organisation</p> <p>Critical gender issues may not emerge</p>

Gorakhpur Environment Action Group(GEAG): The Gender Route

Background

A small group of research students in the science faculty of Gorakhpur University, Uttar Pradesh, initiated the Gorakhpur Environment Action Group (GEAG) in 1975 with the objective of raising awareness on environment amongst students and the larger public (including on effect of chemical fertilizers and pesticides). Its mission widened over the years, and by 1990s it was working to “promote sustainable livelihood of economically challenged agriculture-based communities in Eastern UP and other Hindi speaking regions of India”. Its sustainable livelihood activities are three fold: grassroots level interventions, capacity building of stakeholders, and advocacy with government and public. Since the mid 1990s one of the official objectives of GEAG is to integrate gender equity within all its interventions.

GEAG had been supported by NOVIB, one of the donors funding it, with a monitoring support mission, which included a person with expertise on sustainable agricultural and one with expertise on gender. In 1995 the gender institutionalisation support from NOVIB was strengthened further when it took part in a Gender Focus Programme, which entailed the organisation: i) Going through a process of ‘gender organisational diagnosis’, ii) Setting objectives for gender aware organisational change, iii) Preparing a gender route for fostering gender aware organisational change, iv) Implementing the same, and v) Drawing lessons on the process. The Gender Focus Programme was an international intervention initiated with seven partners of NOVIB from South Asia and the Middle East. GEAG team members periodically met with team members of other

organisations, so that they could share their experiences and learn from each other.

The organisational diagnosis involved self-analysis of gender mainstreaming in mission mandate, organisation structure, and human resource development at three levels: technical (like infrastructure approach), political, and culture level (like organisational approach). Following this analysis, each organisation was expected to draw a route of where it would start, and where it would end.



GEAG's gender aware organizational diagnosis and action plan

GEAG team's own analysis is given below, with those in 'red' font signifying its perceptions on weaknesses, and those in 'green' font signifying strengths, The team initially felt that what was required was changes in the technical aspects of the organisation

	Mission/mandate	Organisation structure	Human Resource Development
Technical point of view		Task and responsibilities related to gender not clearly defined Poor coordination Ineffective gender information system	Inadequate gender expertise due to <ul style="list-style-type: none"> • turnover of gender focal person • not all staff had been trained on gender
Political point of view	Supportive leadership in pushing a gender agenda	Emphasises team work and Culture of collective work and sharing	Space given to women staff to organise themselves
Cultural point of view	Women friendly with a positive gender image in the community and other women's organisations		Gender stereotypes firmly dealt with Willingness to adapt to new practices Enthusiasm of the staff

The objectives that the organisation set for its GFP were to:

- Reorganise the organisational structure for integrating gender at policy and operational levels
- Skill and capacity building of the organisation on gender and development issues at all levels
- Enhancing and sustaining the programme impact by addressing practical and strategic gender interests at the field level

The expected outcomes were the following:

- To have a gender sensitive team at policy and operational levels
- To have a well articulated gender sensitive policy within the organisation
- To have a well articulated affirmative action plan, PMES systems, and staff composition
- Increased gender related capacities and skills at both staff and field levels
- Increased access and control of women over resources at the field level
- Increased participation of women in decision making leading towards self organisation and justice (field level)

The gender related interventions of the organisation

- Gender specific working standards were put in place, like permitting women staff to not travel during menstruation (upto five days a month), providing toilet facilities, following safety protocols, arranging for transport for women staff, limiting the number of late night meetings for women staff, and permitting flexible hours of work for women (upto one hour a day) .
- At senior levels, women social workers were inducted and given training in technical skills. The earlier effort was to induct technically qualified women at leadership level, which was more difficult.
- Introducing equal opportunities to take part in capacity building programmes, expressing their views, chairing meetings etc.

- Efforts were made to induct women into the Board.
- Opening the post of Gender Focal Person to a man or a woman, provided they are sensitive to gender.
- Promoting use of PRA on gender based activity profile and access and control profile in each village before planning.
- Federating women's SHGs at district levels for gender specific advocacy, and linking them up with other women's federation at state levels.

The outcomes:

- Increase in proportion of women at senior and all levels of the organisation
- Increase in proportion of women in the Board by 10%
- Induction of a male Gender Focal person.
- Community women mobilise around violence against women, granting of joint patta when new land is distributed, demands on equal wages, make demands on Gram Sabha on their practical needs, address atrocities against dalit women
- Dramatic change in division of labour in agriculture or ownership of assets, however, has not been possible

Source

Mukhopadhyay, M., Steehouwer, G. and F., Wong, (2006), *Politics of the Possible, Gender Mainstreaming and Organisational Change, Experiences from the Field*, Netherlands: Royal Tropical Institute, and UK: Oxfam



Okkita: A process oriented strategy to institutionalising gender¹ (Drafted by Gandhimathi and Ranjani Murthy, Tamil Nadu for the manual)

Background

Okkita is an organisation that works in coastal Karnataka with traditional fishing community. In 2000 there was a cyclone, and the coastal areas were hit; affecting not only the traditional fishing community living along the coast, but also dalits and other poor communities who were dependent on the coastal economy. Several boats, nets, and fishstocks were destroyed, as well as agriculture land; which became saline due to infiltration of sea water. Okkita, formed in 1985, worked towards strengthening the livelihoods, well being, and empowerment of coastal women, men and children; in an environmentally sustainable manner. Its activities till 2000, in 60 villages, included:

- Organisation and building capacities of children, women, and men (into bal samitis and federations, women's sangams and federations, trade union and its local wings (mainly men)).
- Supporting issue based struggles- atrocities against children, women, fishworkers- at village, Taluk and district levels through the respective organisations.
- Strengthening livelihoods through initiating micro-credit programme through village based women's sangams,
- Supporting local and state level campaigns on protecting coastal resources against environment destruction

Important gender and organisational issues in 2000

In 2000, there was a leadership change with a noted woman activist (non traditional fishing community) taking over as the Director from a male activist (from a traditional fishing community). She was supported by a strong Board, with one third being noted feminists from the state. The Director and some of the Board members felt that the organisation was beset with few problems that needed to be urgently addressed:

- Under the previous Director, the staff at all levels were used to 'top-down' ways of working; and were not willing to take decisions and responsibility themselves.
- All senior staffs were men, other than the new Director, while women were 50% at middle managerial level (mainly in child rights programme), and 60% at field level
- The top down way of working was also reflected in leading the marginalised in community, rather than facilitating and empowering them.
- The organisation had compartmentalized gender issues, and dealt with the same separately. Hence women were found in women exclusive federations, and little in trade unions of fish workers. The bal samitis had more boys in the leadership levels.
- The organisation had compartmentalized programmes with adults and children, with separate field coordinators for programmes with children and adults. The field coordinators and assistance coordinators with adults (mainly men) commanded greater respect than those with children (mainly women).
- The organisation hardly focused on coastal Dalits (men, women and children), who were poorer than the traditional fishing communities. The Government had also neglected them in their relief and rehabilitation measures, and in fact inequalities had increased in the post cyclone period.
- Few dalits were found at senior levels of the organisation, while they were nearly 25% at the field level. There were tensions between the dalit staff and those from traditional fishing communities.

¹ The details of the organisation has been changed to maintain anonymity

Interventions to bring about organisational changes: Gender dalit and democratic lens

The Director, with support from three persons with gender and organisation development expertise, initiated the following interventions. The order of the intervention did not follow any preplanned 'route', but responded to problems as they unfolded:

Strategy

- The 'facilitating' rather than 'leading' role of the Organisation was emphasised (in promoting sustainable livelihoods, well being, and empowerment of coastal women, men and children; in an environmentally sustainable manner).
- The target group was widened to include coastal dependent communities (dalits, landless labourers etc), and not just traditional fishworkers

Programme level:

- The Compartmentalization of women's programmes was broken, with greater number of women being brought into trade union and girls into leadership positions of bal samithis.
- Collective livelihood interventions beyond micro credit were introduced with women federations. These normally entailed asset building, and barriers from traditional male headed panchayats were addressed.
- Ensuring that all houses built in the post cyclone level were jointly owned by women, and constructed under their management.
- Gender and dalit sensitive input, process, output and impact indicators were evolved for all programmes. All base line data gathering systems were modified from a similar lens

Organisation structure and HRD

- The co-ordinationship of child rights interventions and interventions with adults was merged, to ensure integration between these components. This step also automatically brought more women into 'general' field coordination.
- A senior woman member was recruited to coordinate women's rights interventions of the Organisation. She also was given responsibility to facilitate field interventions in a problematic area.
- A core team was organized which consisted of subject matter coordinators- trade union, campaigns, child rights, women's rights administration- and field coordinators who co-ordinated all the programmes in their field area of around 10 villages. This team was responsible for important managerial decisions of the Organisation, and forwarding policy recommendations to the Board.
- Gender and dalit concerns were integrated into job descriptions of all staff. So was the shift from 'leading' the community to 'facilitating' the community.

Organisation culture:

- Skills on appreciative enquiry was strengthened for senior staff, so that they gave feedback to each other, and mingled with each other, without gender and caste bias.
- The team members also had an opportunity to rate each other (anonymously) and themselves on leadership skills, gender and caste attitudes, and performance. This gave them a chance to reflect on their 'under' assessment and 'over' assessment of themselves.

Outcomes:

The outcomes that were seen as a result of the Organisation development were the following:

- Increase in proportion of women/girls and dalits in trade unions and bal samithis.
- Increase in issues of violence against women (including dalits) taken up by federations
- Increase in house ownership and collective assets of women, and their access to income.
- Better integration of gender issues into general campaigns, like proposed privatization of harbour.
- Increase in proportion of women and dalits in leadership positions of Okkita.
- The programmes continue, whether the Director is present or not. Staff who did not want to take responsibility left the organisation
- Strengthening of relationship between staff from dalit and fishing community, and between women and men staff, though all differences could not be resolved.



Freedom is the last best hope of earth
Abraham Lincoln

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