GENDER TRAINING & TECHNICAL ASSISTANCE TO USAID/SOUTH AFRICA
October 10-31, 2005

VOLUME II: APPENDICES

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1. **SCOPE OF WORK (SOW):** **Implementation of Key Recommendations Contained in the USAID/South Africa 2004 Gender Assessment Report**

Introduction and Background

In August 2004, a Gender Assessment[1] was undertaken on behalf of USAID/South Africa as per the Scope of Work (see Annex 1) developed by the USAID/South Africa Program Office and the mission Gender Focal Person. Mission comments on the draft report were solicited and incorporated into the final report which was presented to the mission in November 2004. The report includes a range of recommendations for changes to programs, objectives and staff training relating to gender for each team as well as the mission as a whole. Critically, this gender assessment was undertaken originally as part of the initial planning stages for development of the new Country Strategic Plan for South Africa. The current strategy is due to expire in 2007. However, shortly after this gender assessment was completed, the Agency announced a dramatic shift in how all missions in Africa were going to be doing business. The traditional Country Strategic Plan was determined to be obsolete and instead, a 5-10 page rolling action plan would be developed by each mission by December 2005 in response to A) the new Agency Strategic Plan for Africa and B) the new Program Component Common Indicators developed by USAID/PPC which were both to be finalized sometime in mid-2005. To date, neither has been finalized and indeed, relevant for South Africa, a Middle Income Country sub-Strategic Plan is now also being developed by the Africa Bureau. Funding levels are expected to be aligned directly with these plans starting in FY 2007.

The Gender Assessment Team examined the two facets of gender analysis that are mandatory for all USAID operating units to consider[2]. The analytical work performed in the planning and development of Strategic Objectives and Intermediate Results must address at least two separate and discrete questions: (1) how will gender relations affect the achievement of sustainable results (gender as a variable); and (2) how will proposed results affect the relative status of men and women (issues of gender equity). Recommendations were made by the Gender Assessment Team that would help guide the refinement of current programs and the development of new strategic objectives and programs in relation to both questions. Further, the Gender Assessment Team examined the levels of staff and partner understanding of gender as it relates to USAID programming and in the final report made several key recommendations related to areas where staff and partners would benefit from additional information and training.

Since USAID/South Africa has not yet received information on what sectors it will be limited to for the development of its new rolling action plan, it is not prudent at this point to develop a scope of work related specifically to development of specific new objectives, activities or programs. Program elements currently in place will be winding down and the range of sectors that our new program will include cannot be determined at this time. However, we do believe that several of the recommendations related to improving the skills to deal with gender issues, improving the working understanding of gender, and how to improve collection of gender disaggregated data is critical for mission staff who will be directly involved in the mission level refinement of our new program objectives and intermediate results packages once the South Africa specific sectors are announced.

The USAID/South Africa Gender Assessment Report included the following recommendations that are immediately relevant given the changes to the strategic planning process described above. Other recommendations included in the Report have already been

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[1] The assessment team was funded by the WID office in Washington, D.C., carried out through the WID IQC Task Order 1 (TDY 037; August 4-24, 2004), Short-Term Technical Assistance and Training (STTA) Support awarded to a team primed by DevTech Systems, Inc. (GEW-I-01-02-00019).
[2] As per Automated Directive System (ADS) (201.3.8.4).

acted on and a gender contact person for each Strategic Objective has been identified; a mission-level gender working group has been established and is functioning; and the job description for the mission's gender focal point is being revised. The Executive Summary and full list of recommendations included in the report can be found in Annex 2.

General Mission Recommendations Relevant to Current Scope of Work:
1. Consider providing targeted gender training for interested staff members [from each team]. Prepare an inventory of materials in the mission's computer directory on gender and distribute to staff.
2. The mission also needs a plan to establish a baseline of relevant sex-disaggregated data and to analyze the sex-disaggregated data it is collecting.
3. Gender inequalities, particularly gender-based violence, affect the ability of nearly all the programs to achieve their ultimate development goals, if not always their immediate activity goals. The team recommends developing ways on a sector by sector basis to address gender-based violence as a crosscutting priority as new programming opportunities arise.

Selected Team-Specific Recommendations (consolidated for the purposes of this SOW):

Democracy and Governance Team (Strategic Objective 1): (DG)
1. Organize additional gender training for DG staff; DG team is not fully communicating the extent of its gender work or including men as part of the issue.
2. Consider [use of training experience] to design of a "gender impact" indicator and discuss how to incorporate the indicators in reporting by partners and team [as an exercise to inform the development of future sex disaggregated indicators and reporting requirements.]
3. USAID could request that subcontractors [/partners] analyze sex-disaggregated crime statistics already collected.
4. Explore options for including gender training of judges, traditional leaders, law enforcement officials, journalists, etc.

Education and Training Team (Strategic Objective 2): (ED-TRG)
1. Organize additional gender training for ED-TRG staff specifically to help them better highlight their progress in addressing gender issues through their indicators—both on level of equity but on level of gender as a variable to pay attention to in designing programs to target different populations.
2. Use of gender training experience to design indicators that will be able to capture gender equity gains in new ED-TRG programs.
3. Use of gender training experience to review how to better design future sex disaggregated indicators and reporting requirements.
4. Identify funding from other USAID sources (i.e. WID IQC or Office of Education) to provide the team with the tools to develop activities that address gender violence at schools, that address gender equity concerns in teaching materials, etc.
5. Explore options for including gender training of teachers, students, school management, school health workers, and in the workplace (TELP II).

Health Team (Strategic Objective 3): (Health)
1. Health team could benefit by clarifying both among its members and with its partners what constitutes "integrating" or "mainstreaming" gender.
2. Health teams need to build competency to shift programs from "women only" to "gender-transformative" and to programs that include both men and women as beneficiaries/targets in order to improve impact of programs.

3. Explore options for including gender awareness training as component of HIV training for traditional leaders or communities dealing with issues of care-giving.

Regional HIV/AIDS Team: (RHAP)
1. RHAP Team needs to use sex-disaggregated data collection and targets both in their promotion of condom use among mobile populations and commercial sex workers and in their Corridors of Hope program which has a goal of reaching "young South Africans".

Economic Growth Team (Strategic Objective 4: Economic Capacity Building and Strategic Objective 9: Employment Creation): (EG)
1. For SO4, recommendations noted that much of the sex disaggregated data is already being collected except for the number of full time students under IR4.4.
2. For SO4, recommends that the issue of gender in macroeconomics be included in the macroeconomics courses currently funded but this is a relevant recommendation for this SOW only if similar training programs continue.
3. For SO4, explore options for including gender training as part of various course syllabi and for encouraging government to actively work with line Gender Units.
4. For SO4, explore options for increased networking between new students and former students (many of whom are women) and speakers. Women as role models and contacts, women owned businesses as employers or internships.
5. For SO9: Carry out an analysis to determine the relative success of men and women-owned businesses; identify the characteristics of successful entrepreneurs and share lessons learned; develop case studies (short notes) to communicate about success stories.
6. For SO9: Analyze data on women's financial access from partner to determine if there are gender differences in access to loans.
7. For SO9: explore options in conjunction with SAIBL and PAL for encouraging their client groups to provide support to women (or men if under-represented) participants given for example, women's greater domestic responsibilities. (e.g. day care, different work schedules, reduced hours, transport, etc.)

Housing and Urban Development Team (Strategic Objective 6 and Regional HUDO): (SO6)
1. Team members showed different understandings of the role of gender in their programs and there is a need for gender training tailored specifically for SO6 types of activities. Training can assist the SO6 Team to examine gender issues affecting municipal service delivery, climate change and housing.
2. Training should also cover the development of indicators that capture the impact of programs on gender equity and on development of sex-disaggregated indicators.
3. Explore the development of a baseline study to identify differential and similar participation of men and women in SO6 programs [especially given the recent launch of new SO6 solicitation].
4. Explore how gender can be included in future range of programs and what types of sex-disaggregated data are relevant to potential SO6 programs in municipal service delivery, climate change and housing and links to relevant DG and EG programs.

The recommendations listed above and relevant to this Scope of Work fall into three broad categories overall:
1. Team/sector specific training on gender issues overall. Training should include key team partners as well.
2. Team/sector specific training on development of sex-disaggregated objectives and indicators. Training should include key team partners as well.
3. Facilitation and guidance for team/sector specific exploratory discussions on when and how to address the inclusion of gender in future programming.

Overall the consultants concluded that the mission is supporting several excellent activities that aim to or that are transforming gender relations, but that the Teams do not necessarily recognize these as "gendered activities". The mission also does do some tracking of several sex-disaggregated indicators but that this needs to be improved. Many of the staff members mistakenly understand gender integration to mean a narrow focus on women as a target group rather than the two separate issues of 1) how differential roles, tasks, responsibilities and constraints of men and women affect the outcome of any program (e.g. to reduce infant mortality do you train men, women or both on recognizing signs of and treating dehydration? The answer depends on a host of factors—who controls the income that purchases the taxi fare to the clinic or that purchases oral rehydration treatment may be the deciding factor) and 2) identifying areas of critical gender inequality, whether of men or of women, that can be redressed through appropriate programming (e.g. numbers of women Parliamentarians). The report notes that the mission is not taking full advantage of the information and resources available to it nor is it effectively able to report on the successful gender work it is already undertaking.

Tasks and Deliverables

The purpose of this consultancy is to assist USAID/South Africa to implement key recommendations from its 2004 Gender Assessment Report in order to better integrate gender issues into its ongoing activities and current strategic planning process. In general the work requested in this SOW is expected to help the mission overall better understand the complex issue of gender and thus improve its ability to mainstream gender issues into its new rolling action plan as well as ongoing and future activities. The report that emerges from the proposed training will have the added benefit of informing the ongoing development of the Mission's Gender Action Plan. The training and discussion sessions will allow the consultants to solicit current views and, in conjunction with USAID/South Africa staff and key partners, to develop new ideas and strengthen the working knowledge of gender as it is utilized by USAID.

The three main tasks and deliverables being requested in this Scope of Work are as follows:

1. TRAINING: Team/sector specific training which should also include a limited number of key team partners as identified by each team. This training should be succinct, targeted towards the relevant sector(s) for each team and include working exercises that will help strengthen staff abilities to grapple with the concept of gender. One half day (9 a.m.-1 p.m. or 1-5 p.m.) per team to include:
    a. Training on gender issues in general highlighting and helping teams to fully understand and work with the differences between "gender as technical variable" and "gender as equity issue".
    b. Training on development/improvement of sector specific sex-disaggregated objectives and indicators (or simple data in case of internal management training).
    c. Provision of a list of sector specific resources on gender available within the mission's computer directory for each team.

2. CONTROLLED BRAINSTORMING: Facilitation and guidance for three-quarter day (10 a.m.-5 p.m. with one hour lunch) team-specific exploratory discussions on when and how to address the inclusion of gender in future strategic and activity level planning. If sector specific guidance for the new action plan/strategy has been received from Washington, this can be incorporated into discussions.

3. OVERVIEW AND RECOMMENDATIONS REPORT BACK: Overview report (one electronic copy and three hard copies of the final document) on the training and sector planning discussions and specific recommendations emerging thereof. A draft of this report will be left with the mission upon completion of the TDY and on which the Mission shall provide written comments electronically within 5 working days of receipt of the draft report. The final report will be submitted to the Mission no later than 7 working days after receiving comments on the draft from the Mission. The report will outline and should include:

   a. The questions, issues or key points emerging from each training session on sector specific sex-disaggregated objectives and indicators. Consultants should also offer comments on the potential impact of the proposed approaches, based on their experience in gender mainstreaming.

   b. The issues and key points emerging from the team meetings on inclusion of gender in future strategic level programming.

   c. Recommendations for further development of the mission's Gender Action Plan as per ADS requirements and given multisectoral dimensions of gender issues. A clearly defined "action plan" will allow the mission and its implementing partners to share its knowledge and good practices on gender integration across SO teams, and to publicize its successes more widely.

   d. Any recommendations relevant to the strategy development (sector specific or general) that emerge from the discussions above.

   e. List of sources of sex-disaggregated data emerging from team sessions, preparation meetings and/or from consultants' knowledge base.

The teams that will each require separate Training and Brainstorming sessions are as follows:

1. Democracy and Governance (SO1)
2. Education and Training (SO2)
3. Health and HIV/AIDS (SO3)
4. Regional HIV/AIDS Program (RHAP) (though SO3 and RHAP may prefer joint sessions)
5. Economic Growth (SO4 and SO9)
6. Housing and Urban Development (SO6 and Regional Housing and Urban Development)

The teams that will require only the half-day Training session are as follows but the Mission would consider holding a one or two joint sessions for these cross-cutting or non-programmatic offices:

1. Financial Management Office
2. Office of Acquisition and Assistance
3. Executive Office
4. Office of the Director
5. Program and Project Development Office (PPDO staff may opt to sit in with the sessions for the teams they normally cover.)

Methodology

1. Comprehensive review and analysis of pertinent literature, training manuals and documents, including, but not limited to, materials suggested by the Mission personnel and partners.
2. Meetings, interviews and discussions with USAID/South Africa SO teams and other relevant staff and partners. These shall include:

      a.   entry and exit briefings with Mission Management, the Gender Focal Person and the Program and Project Development Office;

      b.   meetings with SO teams on specific sectors and areas of interest as noted above;

3. Written report as described above.

2. SCHEDULE FOR SOUTH AFRICA TRAINING & TECHNICAL ASSISTANCE

Monday 10/17	Tuesday 10/18	Wed. 10/19	Thurs. 10/20	Friday 10/21
TIME: 9 - 12 **Team 4** Training Room: 123	9 - 12 **Team 5** Brainstorming* Room: 251	9 – 12 **Team 4** Brainstorming Room: 251	9 - 12 **Team 7** Training Room: 215	9 - 12 **Team 7** Brainstorming Room: 251
TIME: 1 – 4 **Team 5** Training Room: 251 (SO4/9 to 200)	1 – 4 **Team 5** Brainstorming Room: 251	1 – 4 **Team 4** Brainstorming Room: 251	1 – 4 **Team 2** Training Room: 144 (EXO & FM) 251(RIG & OAA)	1 – 4 **Team 7** Brainstorming Room: 251

Monday 10/24	Tuesday 10/25	Wednesday 10/26	Thursday 10/27	Friday 10/28
TIME: 9 - 12 **Team 3** Training Room: 215	9 - 12 **Team 6** Brainstorming Room: 215 (EG) Melanie's Office (OFDA & FFP)	9 – 12 **Team 3** Brainstorming Room: 215	9 - 12 **Team1(PPDO and RLA)** Training Room: 251	TIME: 9 - 12 **Team 1(FO)** Training and Wrap-Up Room: Lion's Den
TIME: 1 – 4 **Team 6** Training Room: 251(EG) 123 (OFDA &FFP) (SO6 to 200)	1 – 4 **Team 6** Brainstorming Room: 215 (EG) Melanie's Office (OFDA & FFP)	1 – 4 **Team 3** Brainstorming Room: 215		

TEAMS
1. Front Office and Program Office
2. Four Mission Offices (Financial Management, Office of Acquisition and Assistance, Executive Office and the Regional Inspector General's Office)
3. Democracy and Governance
4. Education
5. Health and Regional HIV/AIDS Program
6. Foreign Disaster Assistance, Food for Peace
7. Economic Growth teams
8. Local Government Services

NOTE: "Brainstorming" included extended gender sector training and preparation of Action Plans.

3. BIOGRAPHICAL SKETCHES OF THE TRAINING & TECHNICAL ASSISTANCE TEAM

This four-person team spent three weeks at the Mission. All team members had previous work experience in South Africa.

Team Leader Maggie Range, a consultant with more than 30 years' experience in training and curriculum design, currently serves as a Senior Technical Advisor with Dev-Tech Systems Inc. under the USAID WID Office Gender IQC, charged with the creation of gender and sector training materials for the USAID website. Author of the training package, *Chrysalis: Leadership Training for Pioneering Women*, she has contributed to numerous training manuals. With experience in gender training throughout Africa, she served as a gender trainer for the South Africa National Department of Agriculture and, for the last five years, in China. She served on the faculty of the School for International Training in Brattleboro, Vermont, for six years. In her first career in journalism, she worked for U.S. newspapers and Agence France Presse, the French wire service, in Thailand.

David Omambia from Kenya is a consultant with more than 20 years of experience in community-based health care, agriculture, and development programs, including a focus on institutional gender mainstreaming. He holds a Master's Degree in Medical Anthropology, a Diploma in Public Health, and is a certified Master Gender Trainer by the UN FAO. For 14 years, David has worked with AMREF (African Medical and Research Foundation), a leading NGO in Africa. He has been a National Advisor in Primary Health Care Development and Training with the Ministry of Health in Namibia and served as East Africa Regional Training Manager for Winrock International's African Women's Leadership Program. He has also assisted projects and partner institutions to mainstream gender in China.

Susan Somach is a gender and development consultant with nearly 20 years of teaching, training and presentation experience. She is formerly the full-time cross-sectoral Gender and Youth Advisor for USAID/Russia, and has conducted gender assessments, training and technical assistance for USAID missions worldwide under the Gender IQC. Before working with USAID, she directed a social service agency focused on refugee/immigrant women and children, including women's health and employment, youth development, and domestic violence prevention activities. She also has years of experience providing technical assistance to U.S. and overseas refugee programs, teaching in the faculties of law and economics in Hungary, and practicing banking and securities law in Washington, DC.

Dian Seslar Svendsen is a consultant for human and organization development with more than 35 years international development experience in more than 35 countries. She has worked with major international organizations utilizing participatory approaches to design, implement, manage, and evaluate development activities. Gender is a cross-cutting issue in all of her work. She is the author of several major training manuals and holds a Doctorate in Education and two Masters Degrees – one in Educational Development and one in International Administration.

4. INTEGRATING GENDER IN USAID DOCUMENTS

From Concept to Activity Planning to Assessment*

1. **Strategy** – Gender Assessment may be a part of strategy development process

2. **Concept Paper**
   - Consult gender sections of strategy
   - Review any disaggregated data related to development challenge (from previous related activities, published sources, implementing partners, gender experts in the field)
   - Identify known gender issues
   - Include gender section and identify any further gender analysis needed

3. **Activity Document** – In one page or less, outline the most significant gender issues that need to be considered during activity implementation. These issues should reflect consideration of the following two questions:
   - Are women and men involved or affected differently by the context or work to be undertaken?
   - If so, is this difference potentially significant for managing toward sustainable program impact?
   [Alternatively, if it is determined that there are no significant gender issues, a brief rationale to that effect must be included.]

4. **Procurement:** RFP, RFA, APS, etc.
   - Include gender statement or confirm that rationale for not specifying gender issues is part of activity approval, AND
   - For evaluation criteria, include appropriately weighted criterion addressing the gender considerations (see example below***)
   - Note: G/WID office can help develop criterion to evaluate the plan's positive impacts on the socio-economic status of women, any differential impacts on men and women, and methods for measuring these impacts.

5. **Contract** – Include gender language appropriate to activity (see example below ***)

6. **Workplan** – Include gender language appropriate to activity that 1) explains how gender considerations are to be integrated and 2) requires collection and reporting of disaggregated data and analysis of gender differences throughout the life of the activity

7. **Reporting** – Check to insure that reports include:

   - Disaggregated indicators
   - Other disaggregated information
   - Analysis of any significant gender differences
   - Proposed actions to correct identified gender differences, if appropriate

8. **Customer Feedback** – Any activities, such as those listed below, should include both women and men and should be developed recognizing the roles and responsibilities of both women and men.
   - Consultation with customer representatives
   - Identify intended customers
   - Use of focus groups, town meetings, surveys
   - Assessments

9. Assessments & Evaluations – can be used when performance information indicates an unexpected result (positive or negative) that should be explained (e.g., gender differential results). *[Note also that assessments and evaluations, like any procurements, should integrate gender considerations, i.e., composition of the assessment team, ensuring that gender issues are identified and included in the scope of work, and collecting disaggregated data.]*

SELECTED EXAMPLES of GENDER LANGUAGE

RFA Language (general integration of gender)
Gender Overall: Likelihood to reach and benefit a diverse group of beneficiaries, including both female and male young people [entrepreneurs, etc.] from both minority and majority ethnic groups.

Contract/Grant Language
Gender integration is an important part of this project, focusing on the participation of and benefits to each gender. To the greatest extent possible, the Contractor/Recipient shall seek to include both men and women in all aspects of this program including participation and leadership in <u>meetings, associations, working groups, training and counseling activities, exchanges, and delegations</u>.* The Recipient shall collect, analyze and submit to USAID sex-disaggregated data and propose actions that will address any identified gender-related issues.

<u>Note:</u> the activities listed should be modified to reflect the project that is being implemented

*Developed by Susan Somach, based on ADS

1. GENDER-FOCUSED ORGANIZATIONAL LEARNING
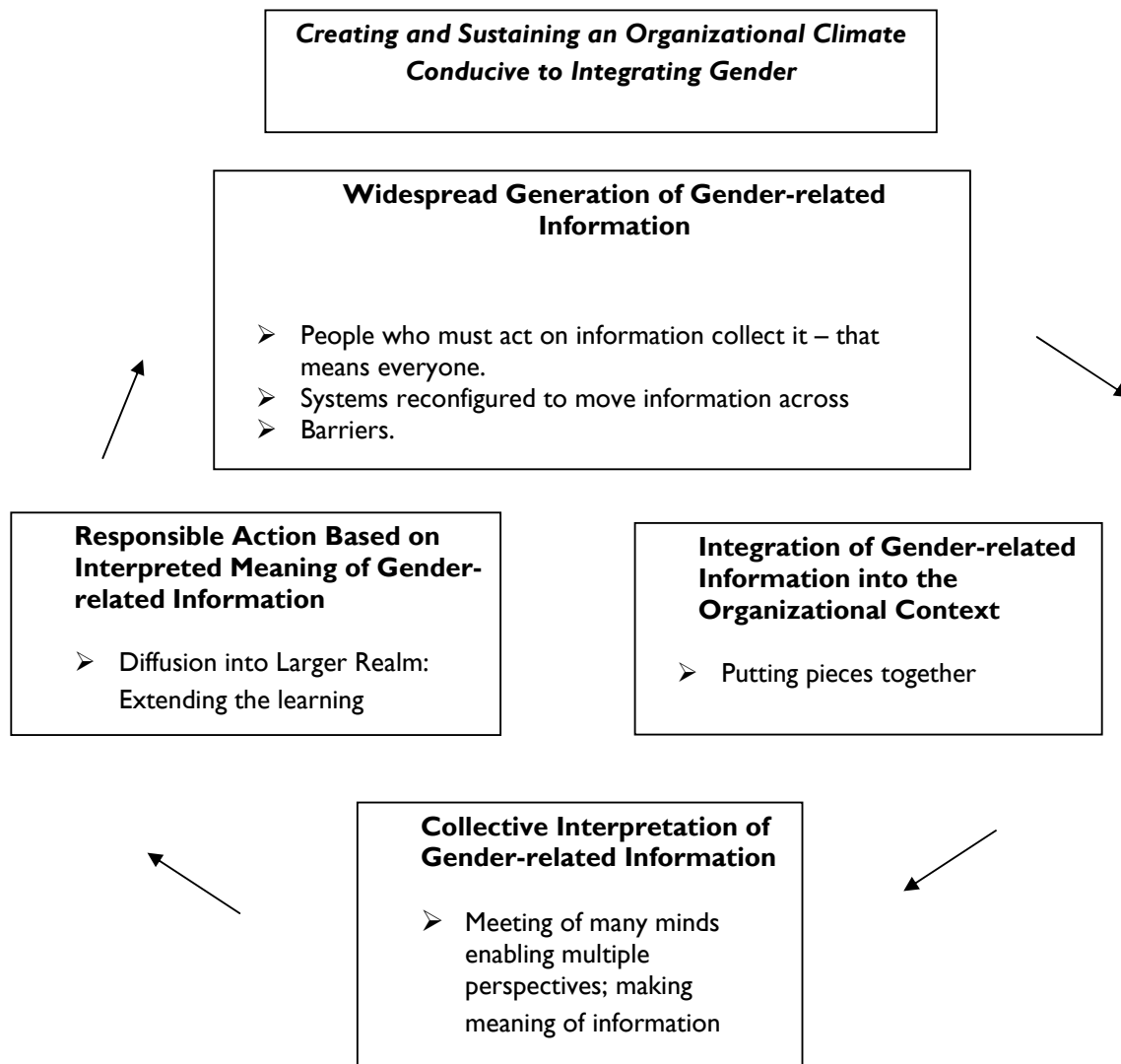## WORKSHEET FOR SOUTH AFRICA MISSION: Discussion Draft3:

Just as individuals and teams reflect on experiences and take in information in order to learn, and thus improve future actions, so can organizations. Many organizations take in and disseminate information, but many do not systematically engage in model illustrates the steps in a gender-focused organizational learning cycle.

First, the organizational climate must be conducive to creating and sustaining gender integration. The organization must then have mechanisms in place to generate, or capture, gender-related experience and information. Next, in order for this information to have meaning within the organizational setting and context, members must have opportunities to integrate it into the organizational context. That is, members must be able to see the relevance – where it fits. And then, collectively, organization members must be able to analyze, interpret or make meaning of the information – to own it. Only then can the organization act in newly responsible ways.

The Gender Team has worked with the Gender Focal Point person to analyze gender integration within the USAID South Africa Mission with an organizational learning perspective. The Mission seems to be progressing well in terms of creating an atmosphere conducive to gender-focused organizational learning and also in terms of the widespread distribution of information. But for learning and increasingly responsible organization behavior, there is room for improvement in terms of integrating and interpretative information. In some cases mechanisms exist, but helping to make them more effective is the organizational challenge. The discussion draft of a "worksheet in progress" may provide guidance on how the mission can help ensure systematic integration of gender.

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[3] Even though this document is appearing in a report, it should be considered a "discussion draft." It is intended to stimulate discussion and possible action. But it must remain a process, as is learning, always evolving and changing.

Gender-focused Organizational Learning Cycle[4]

Creating and Sustaining an Organizational Climate Conducive to Integrating Gender

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Widespread Generation of Gender-related Information

➢ People who must act on information collect it – that means everyone.
➢ Systems reconfigured to move information across
➢ Barriers.

Responsible Action Based on Interpreted Meaning of Gender-related Information

➢ Diffusion into Larger Realm: Extending the learning

Integration of Gender-related Information into the Organizational Context

➢ Putting pieces together

Collective Interpretation of Gender-related Information

➢ Meeting of many minds enabling multiple perspectives; making meaning of information

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Imagine these boxes forming a circle that is part of a continuing cycle of learning with responsible action leading to generation of more information that can work through the cycle to result in new learning for the organization.

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[4] Adapted from Dixon, N. (1994). The organizational learning cycle: How we can learn collectively. McGraw-Hill Developing Organizations Series. McGraw-Hill International: UK.

Steps in Organizational Learning Cycle	Current Status	What Is Needed?	Possible Action Steps
Creating and Sustaining an Organizational Climate Conducive to Integrating Gender	• SAG policy framework promotes gender equality • Strategic Framework for Africa says is gender is a cross-cutting theme • The draft Mission Order, Integrating Gender into USAID/South Africa's Program Portfolio, establishes procedures and mechanisms to ensure effective integration of gender issues • Staff members trained in gender 3/04 • Mission wide gender assessment and mandatory gender training completed. Gender success stories collected • Building widespread shared understanding of gender and how gender can be integrated into offices and development activities • GAT members building capacity through meetings; exposure to outside seminars, etc. • Gender Focal Position established • Adherence to ADS: sex-disaggregated statistics collected and reported • Front Office commitment • Social events to build awareness of gender e.g. Women's Day event	• More emphasis on gender considerations within HR, Executive Office, and other internal and support office staff and functions • GAT team members could play a more active role in helping to keep gender in the forefront of people's thinking • Continue to nurture a safe environment for discussion of sensitive issues • Make it clear that integrating gender is the responsibility of ALL • Publicly recognize/reward staff and partners who are positive gender role models • Team leader commitment and regular check at team meetings	

Steps in Organizational Learning Cycle	Current Status	What Is Needed?	Possible Action Steps
The Widespread Generation of Gender-Related Information	• Extensive gender resources listed and regularly updated on the "public" drive (P:/gender); • Gender Focal Person and GAT members attend Donor Network on Women meetings, seminars conferences, and feed information back at GAT meetings and to teams. • Gender Focal Person meets with other donors and feeds information back to GAT • Gender Focal Person and External liaison Specialist share appropriate information with CO Teams • SO Teams alert Gender Focal Person of information available • Gender-related materials in libraries • Gender CD and handouts distributed to all at gender workshop • Listservs?	• Determine level of use and usefulness of P:/gender • Collect and disseminate "best stories" – catch people in the act of constructively considering gender! (Staff, partners, etc.) • Encourage USAID partners to report on gender progress, then disseminate this information as appropriate • Have regular "What's Happening with Gender Day"	

Steps in Organizational Learning Cycle	Current Status	What Is Needed?	Possible Action Steps
Integration of Gender-Related Information Into Organizational Context	• Potential for GAT members to be pivotal in integrating gender-related information • Gender Focal Person noted that social functions, e.g. Women's Day function and speakers, e.g. intended to be more that information – sharing events – also meant to change attitudes and practices. (see note in next column)	• GAT needs clarity re: purpose and Mission; members need to be influential and therefore preferably senior staff or team leaders should drive GAT • Determine effectiveness of information on P drive • Speakers and social functions remain "information dissemination" unless conscious mechanism to *integrate and interpret* information. • Gender Focal person attend sector meetings quarterly or semi-annually. • Systematically include gender on meeting agendas.	
The Collective Interpretation of Gender-Related Information	• Mechanisms, such as the 2004 retreat and brown bag lunches, provide opportunities for collective interpretation • GAT provides a mechanism for consistently bring gender issues to staff meetings • Gender issues discussed at senior staff meetings	• Use events such as staff retreats as an opportunity to reflect on gender-related information • Incorporate meaning making/interpretation related to gender into existing activities • Collective interpretation needs to be regularly addressed, as well as "ad hoc" •	
Responsible Action Based on the Interpreted Meaning	• Reporting gender issues in old and new issues in PIRS	• Continue/increase involvement of men as partners, not obstacles to integrating gender • Ensure that identified actions are monitored and lead to action reflecting positive change	

2. EXPERIENCE WITH GENDER: PRE- AND POST-TRAINING SELF-ASSESSMENT

This instrument was administered at the preliminary meetings with staff members and, again, after they had completed their training. Results for individual teams were distributed to the participants.

Small numbers to the left side indicate ***pre-training*** responses; large italicized bold numbers to the right indicate ***post-workshop*** responses.

Understanding of the term "gender"					
	Unclear	A little	A fair bit	A lot	Completely
OVERALL MISSION	5	11	45 **7**	23 **33**	5 **25**

Understanding of the difference between "gender" and "WID"					
	Unclear	A little	A fair bit	A lot	Completely
OVERALL MISSION	33	22	20 **10**	9 **27**	2 **28**

Understanding the difference between "sex" and "gender"					
	Unclear	A little	A fair bit	A lot	Completely
OVERALL MISSION	9	19	34 **4**	21 **25**	3 **38**

Awareness of this sector's/office's gender issues					
	Unaware	A little	Somewhat	Fairly	Fully
OVERALL MISSION	14	18 **1**	28 **5**	30 **37**	3 **18**

Extent to which this sector/office collects, analyzes, &utilizes sex-disaggregated data					
	Not at all	A little	A fair bit	A lot	As fully as possible
COLLECTS					
OVERALL MISSION	23 **5**	20 **7**	24 **23**	8 **23**	6 **2**
ANALYZES					
OVERALL MISSION	22 **5**	30 **12**	19 **22**	6 **15**	2 **2**
UTILIZES					
OVERALL MISSION	22 **4**	29 **10**	17 **24**	10 **17**	2 **6**

Ability to determine gender impact of program/sector activities					
	Weak	A little	Ok	Quite skilled	Highly skilled
OVERALL MISSION	19	19 **5**	37 **34**	6 **20**	0 **3**

3. DEMOCRACY AND GOVERNANCE (SO1) & AND LOCAL GOVERNMENT (SO6) REPORTS

DEMOCRACY & GOVERNANCE

Gender Issues in Democracy & Governance Sector

Based on meetings, training, and facilitated working sessions, some key gender-related areas in Democracy and Governance, as highlighted by the SO1 team, include:

- The need to deal with gender-based violence (GBV), including understanding/consideration that crime usually has a gender dimension; crime affects the different sexes differently, and the need to pay attention to the various roles of government (legislative, judicial, executive) and NGOs (including through public-civic partnerships) in addressing GBV in a wide range of services.
- The lower numbers and capacity of female counselors, and the challenge of the 50/50 mandate for upcoming local government election.
- Women's participation in civil society and government services, and the potential impact of HIV/AIDS.
- The need to increase the participation of women in the judiciary.
- The issue of women-headed households and child-headed households, and the resulting gendered challenges to education, health and other services.

Key points from the DG Action Plan

The 2004 Gender Assessment included six recommendations for the Democracy and Governance Team. To develop their Action Plan for integrating gender into SO1 activities, the DG Team examined these recommendations and revised them to reflect their current activities, focusing on recommendations for each area of their work: rule of law, civil society, and local governance. The Team made plans to continue with the recommendation to incorporate a "men as partners" approach to all rule of law activities addressing GBV, by adding a focus on masculinities and changing men's attitudes and behaviors. The Team also agreed to seek funding to address the civil society and local governance recommendation of improving the capacity of councilors, especially women councilors. To that recommendation, they added a necessary component of training for CBO leaders to increase their effective participation in municipal affairs, with a special focus on women leaders and gender issues.

The suggested revision of indicator IR 1.1 to better capture the impact of programs addressing gender violence has already been addressed in the development of new conviction rate indicators. The new indicators will measure convictions divided by the number of cases on the dockets to include the cases that the prosecutors refuse to prosecute. The Team added an overall recommendation to ensure that implementing partners are disaggregating statistics and providing adequate gender analysis.

As with SO1's Action Plan, the fourth SO6 recommendation relates to the planned combining of SO1 and SO6 in the new strategy that will result in a joint results framework and indicators that incorporate gender considerations. An upcoming opportunity for combined efforts is to seek SO1 input on the baseline assessment for the ISLGS activity.

> **The Democracy and Governance Team**
> **ACTION PLAN RECOMMENDATIONS**
> 1. (Rule of Law) DG will include men and add a focus on masculinity to change attitudes and behaviors in the following activities: (i) CBO training; (ii) training of prosecutors, magistrates, judges, (iii) victim empowerment programs (VEP) capacity-building; (iv) learner programs; (v) anti-recidivism NGOs; (vi) chiefs; and (vii) investigative journalism.
> 2. (Local Elections & Civil Society) Post-election training of councilors with special focus on women councilors in select municipalities; training of CBO leaders to feature effective participation in municipal affairs with special focus on gender issues and women leaders.
> 3. CTOs will ensure that implementing partners disaggregate statistics by sex and provide adequate gender analysis.
> 4. SO6 and SO1 will incorporate gender into baseline assessment phase of ISLGS contract work, including joint results framework, indicators.

The four Action Plan recommendations are based on the six recommendations contained in the 2004 Gender Assessment.

DG Recommendation #1:
(Rule of Law)
DG will include men and add a focus on masculinity to change attitudes and behaviors in the following activities: (i) CBO training, (ii) training of prosecutors, magistrates, judges, (iii) victim empowerment programs (VEP) capacity-building, (iv) learner programs, (v) anti-recidivism NGOs, (vi) chiefs, and (vii) investigative journalism.

This recommendation addresses the following the 2004 Gender Assessment recommendation

- Include men in communities and male CBOs taking a "Men as Partners" approach that addresses issues of masculinity linked to gender based violence, and helps change attitudes and behaviors that contribute to violence.
- Organize gender training and awareness raising activities for law enforcement officials, judges, traditional leaders, and support investigative journalist in addressing gender issues related to court cases on domestic abuse.

Steps to Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
Consult with partners.

All activity designs and modifications will include measures to achieve recommendation.

Develop and use drop-in language where possible. | CJSP – commence Q1 FY06

CSSP – commence Q2 FY06 | CJSP – CTO Matshwane

CSSP – CTO Masihleho

Support – AM Mokoana

Nagger – A/TL Snook | New service delivery SO post FY06.

Outgoing DG SO during FY06 and relevant partners. | See Recommendation #3 re indicators. | Partners agree/concur. |

DG Recommendation #2:
(Local Elections & Civil Society)
Post-election training of councilors with special focus on women councilors in select municipalities, and training of CBO leaders to feature effective participation in municipal affairs with special focus on women issues and leaders.

This recommendation addresses the following 2004 Gender Assessment recommendations:

- Require bidders to propose strategies for including gender focal points of line ministries in their proposed activities.
- New contractor has a staff position for a gender specialist.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
LGSP: Consult DPLG and SALGA. Based on above, develop SOW. Procure a service provider. CSSP: Discuss with Idasa Adapt Idasa's Phase II Action Plan.	LGSP – commence one Qtr after elections. CSSP – commence 1stQ FY06.	LGSP – CTO Xulu CSSP – CTO Masihleho Support – AM Mokoana Nagger – A/TL Snook	New service delivery SO post FY06. Outgoing DG SO during FY06 and relevant partners.	See Recommendation #3 re indicators.	Funds available SALGA and DPLG concur Idasa concurs

DG Recommendation #3:
CTOs will ensure that implementing partners disaggregate statistics by sex and provide adequate gender analyses.

This recommendation is an overall recommendation to ensure ongoing gender integration in Democracy and Governance activities. This recommendation addresses the following 2004 Gender Assessment recommendations:

- Seek funds for training potential women councilors, e.g., the women inward committees who are already trained by the SO1 activities.
- Consider design of gender impact indicator and discuss how to incorporate the indicators in reporting by partners and team.

The second recommendation included gender training for SO1 staff, which was addressed by the activities of the gender training and TA team. The new indicators on gender based violence (discussed below) also address that recommendation.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
SO team to determine best means and implement (at a minimum a round of meetings with implementing partners). Develop gender integrated/sensitive indicators.	Commence no later than Q3 FY06 (will vary by program).	Full SO Team	New service delivery SO post FY06. Outgoing DG SO during FY06 and relevant partners.	Sex-disaggregated statistics and analyses provided in reports from implementing partners.	Partners will cooperate. Cost implications are not severe.

<u>**DG Recommendation #4:**</u>
SO6 and SO1 will incorporate gender into baseline assessment phase
of ISLGS contract work, joint results framework, and indicators.

This recommendation relates to the planned combining of SO1 and SO6 in the new strategy, and addresses the following SO6 recommendation from the 2004 Gender Assessment that suggested combined efforts:

- SO1 and SO6 will need to develop common indicators related to gender and a baseline.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
First Steps – Assess and Design phase of ISLGS: SO6 and SO1 provide input to ISLGS contractor. Conduct assessment. Obtain baseline statistics. Next Steps: SO6 and SO1 consult with other SO1 partners.	Oct 31 – Nov 15, 2005 – consultations with SO6. Nov 15 – Apr 2006 – Design. May 2006 – statistical collection.	SO6 + SO 1 PPDO	ISLGS contractor	Sex-disaggregated statistics and gender data collected considered in design of ISLGS. Next Steps: Common results framework and sex-disaggregated statistics.	ISLGS contract signed by Oct. 31, 2005. Design phase completed on time. Budget cuts don't impair statistical collection. Next Steps: AFR Bureau's strategy is approved by PPC.

The additional 2004 Gender Assessment recommendation to revise the indicator IR 1.1 to better capture the impact of programs addressing gender violence has already been addressed in the development of new conviction rate indicators. The indicators will measure convictions divide by the number of cases on the dockets to include the cases that the prosecutors refuse to prosecute.

LOCAL GOVERNMENT SERVICES

Gender Issues in the Local Government Services Sector

Based on meetings, training, and facilitated working sessions, the key gender-related areas in Local Government Services, as highlighted by the SO6 team, appear to be:

- Impact of HIV/AIDS on service delivery and cost recovery issues, with an emerging special concern about child-headed households.
- Getting appropriate sex-disaggregated statistics and gender data from upcoming baseline assessment on local government services.
- The gender implications in housing (number of rooms, types of sanitation facilities, etc.), water/sanitation (availability, location, type, etc.), cost and availability of electricity.
- The overriding challenge of meeting the South African government 2008-2012 mandates of universal provision of water/sanitation, electricity, and basic shelter – which will necessarily include single-headed households (mostly women) and child-headed households.

Key points from LG Action Plan

The 2004 Gender Assessment included four recommendations for the Local Government Services Team. To develop their Action Plan for integrating gender into SO6 activities, the Local Government Services Team examined these recommendations and revised them to reflect their current activities, especially related to the ISLGS assess-design-implement activity and the DCA APS. The ISLGS will first be conducting a baseline assessment that will need to include gender considerations in the assessment, design and implementation. A gender specialist will be identified to assist in that process, and will meet with gender focal points in the South African government (national and local level, as appropriate where they exist). The DCA APS will include a paragraph on statistical and data requirements for the proposals from private sector financial institutions.

As with SO1's Action Plan, the fourth SO6 recommendation relates to the planned combining of SO1 and SO6 in the new strategy that will result in a joint results framework and indicators that incorporate gender considerations. An upcoming opportunity for combined efforts is to seek SO1 input on the baseline assessment for the ISLGS activity.

The Local Government Services Team
ACTION PLAN RECOMMENDATIONS

1. Program results reporting and monitoring will detect and highlight gender impact and report on it FY05 & FY06.
2. Include SOAG paragraph on gender and ISLGS gender specialist meets with gender focal points in South African government.
3. USAID APS will require proposals to address gender activity planning and analysis and will include gender sensitive evaluation criteria.
4. SO6 and SO1 will incorporate gender into baseline assessment phase of ISLGS contract work, joint results framework, and indicators.

The four Action Plan recommendations are based on the four recommendations contained in the 2004 Gender Assessment.

<u>**LG Recommendation #1:**</u>
Program Results Reporting and monitoring will detect and highlight gender impact and report on it FY05 & FY06.

This recommendation addresses the following 2004 Gender Assessment three-part recommendation

- Household indicator should be disaggregated to capture impact on gender.
- Narrative on capacity building indicator could discuss men's and women's community participation.
- Key questions on gender should be asked of grantees and contractors as part of their regular reporting requirements.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
Request grantees and contractors to report suggested statistics (send common indicators) to current (FY05) partners and FY06 partners. Meet with new partners and contractor to discuss importance of gender impact reporting and AID requirements and solicit inputs through stakeholder consultations.	October 31, 2005 - send letter out to partners. Nov 15 – 30, 2005 – Consultations with partners (especially on the CRIB method; common indicators and impact reporting). Dec 1 – 15, 2005 – Filed visits (to confirm and do spot checks), Gauteng, Cape Town & Durban.	CTOs	Partners (implementers) Municipal Gender Portfolio Councilor Community Leaders	Use of narrative indicators Common indicators Ability to analyze statistics in gender terms	ISLGS contract signed by October 31, 2005

LG Recommendation #2:
Include SOAG paragraph on gender and ISLGS gender specialist meets with gender focal points in South African government.

This recommendation addresses the following 2004 Gender Assessment recommendations:

- Require bidders to propose strategies for including gender focal points of line ministries in their proposed activities.
- New contractor has a staff position for a gender specialist.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
SOAG revised if required. ISLGS contract signed. Gender specialist identified.	Nov 15 – Dec 30, 2005: assessment phase. July 2006 – SOAG of ISLGS drafted (includes gender paragraph)	PPDO + Teams (SOAG)	OAA (contract signing) SO6 Team Gender Coordinator	Gender strategy elements developed	ISLGS contract signed by October 31, 2005 ISLGS contractor mobilizes Gender specialist / assessment team

LG Recommendation #3:
USAID APS will require proposals to address gender activity planning and analysis and will include gender sensitive evaluation criteria.

This recommendation is an overall recommendation to ensure ongoing gender integration in Local Government Services activities.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
New APS will require ISLGS input through design phase. Modify DCA APS to include paragraph on gender data requirements.	New APS under ISLGS by April 2006 DCA APS – October 31, 2005.	CTO for ISLGS DCA - CTO	Contracting Officer	New generation of grants fully integrating gender impact. DCA proposals from private sector financial institutions addressing gender issues in lending.	ISLGS contract signed by October 31, 2005. PPDO clears on DCA APS by Nov 15, 2005.

LG Recommendation #4:
SO6 and SO1 will incorporate gender into baseline assessment phase of ISLGS contract work, joint results framework, and indicators.

This recommendation relates to the planned combining of SO1 and SO6 in the new strategy, and addresses the following recommendation from the 2004 Gender Assessment:

- SO1 and SO6 will need to develop common indicators related to gender and a baseline.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
First Steps – Assess and Design phase of ISLGS SO 6 and SO1 provide input to ISLGS contractor. Conduct assessment. Obtain baseline statistics. [Next Steps SO6 and SO1 consult with other SO1 partners]	Oct 31 – Nov 15, 2005 – consultations with SO1 Nov 15 – Apr 2006 – Design May 2006 – statistical collection	SO6 + SO 1 PPDO	ISLGS contractor	Sex-disaggregated statistics and gender data collected considered in design of ISLGS [Next Steps: Common results framework and sex-disaggregated statistics]	ISLGS contract signed by Oct 31, 2005. Design phase completed on time Budget cuts don't impair statistical collection [Next Steps: AFR Bureau's strategy is approved by PPC]

SO1 (DG) and SO6 (LG) Synergies, Challenges and Gender Issues

As part of the facilitated working sessions for both SO1 and SO6, the teams discussed synergies, challenges and gender issues related to the upcoming combination of their SOs. The following is a list of the areas of discussion:

- **Diversity of experience and expertise in service delivery: national government, local government, CBOs, NGOs/public benefit organizations -**
  - o Gender knowledge/experience/approach may differ among sectors.
  - o Opportunity to create integrated approaches recognizing roles and responsibilities of different entities.
  - o Share best practices.
  - o Creative solutions for providing services to vulnerable populations (disabled, home-based care).
- **Capacity-building of municipalities for service delivery** – skills, readiness for public-civic/private partnerships and access to loans, Thuthuzela as a model of comprehensive service delivery, applicable to other service areas (e.g., vulnerable populations)?
- **Role of advocacy and watchdog organizations, including CBOs** – monitoring local government services, interest/ability to work with government structures/requirements.
- **Anti-corruption and local government** – gender and corruption, women/men in local government, theft of services.
- **Rule of Law** – GBV and the role of traditional leaders and local government, conviction rates.
- **Statistical Collection & Use** – Collection and analysis of sex-disaggregated statistics, gender data.
- **Measuring Gender** – Looking at GBV and its impact on society, including challenges to local governance.

4.   EDUCATION (SO2): REPORT & MATERIALS

Gender Issues in the Education Sector: The SO2 team highlighted four major areas:
   ➢ Impact of HIV/AIDS on teachers, students, and communities.
   ➢ Increasing access to quality education for both boys and girls.
   ➢ Gender-based violence directed at both boys and girls.
   ➢ Building capacity of teachers regarding attitude and behavior change.

The education team also identified the following reasons why gender is important to the sector:
   • Education in and out of schools plays an important role in influencing and changing attitudes related to gender and gender stereotypes.
   • Education can influence equitable relationships through educational programs, including increasing school access for all children.
   • Because of lower educational levels, women have been excluded from certain careers.
   • School curriculum should include gender relevant materials and be sensitive to gender stereotyping.

The Education Team
ACTION PLAN RECOMMENDATIONS
1. Integrate gender into new and existing teacher training modules.
2. Support life skills programs that examine masculine/feminine identity behaviors for learners.
3. Support strategies that would address barriers that deter girls from studying math and science.
4. Support research on the impact in communities most hard hit by HIV/AIDS as a follow-up to the HSRC (2005) HIV/AIDS study.

The 2005 Action Plan reflects and responds to SO2 Objectives and Indicators, the Africa Strategy, the 2004 Gender Assessment, and Mission Order regarding integrating gender into USAID's South Africa Program Portfolio. The 2004 Gender Assessment included 15 recommendations for the Education Team, which they re-examined, identified those that have already been addressed, combined some, and added others to reflect new initiatives and opportunities.

Some recommendations in the 2004 Gender Assessment are beyond the scope of SO2. The team identified these as policy issues to address:

   • Teacher redeployment should be considered especially in HIV and AIDS studies.
   • Language issues (the Education Team can only provide support).
   • Management and leadership for women in the education sector. SO2 can help some, through WHEEL, for example, but cannot address overall issues.

If the proposed 2005 Action Plan recommendations are successfully implemented, activities would help to address the following points, which these documents specify:
   • Integrate gender as part of new and existing teacher training modules.
   • Decrease gender-based violence through addressing attitudes and behaviors related to masculine/feminine identity, establishing positive mentor relationships, providing positive incentives, through scholarships; and working with SO3 on HIV and AIDS initiatives.

- Decrease gender-based violence among teachers by including increasing awareness through inclusion of relevant materials into teacher training modules.
- Strengthen overall classroom participation and performance through building teacher awareness and understanding of gender and its impact.
- Increase girls' access to quality education, including math and science, as well as the provision of skills and training to both girls and boys.
- Increase provision or training skills.
- Better understand the impact of HIV and AIDS on communities and schools in areas hardest hit by HIV and AIDS.

The Education Team collects and analyzes sex disaggregated statistics. For example, the baseline testing of grades 3 and 6 in the IEP is sex-disaggregated, as are statistics in the Annual Assessment of grades 3 and 6, all USAID supported teacher testing and teacher training, as well as statistics related to the School Governance Board. Team members are also alert to the fact that these numbers do not tell the whole story. Part of the work they will be undertaking with teacher training modules focuses on boys' and girls' classroom participation, which goes beyond parity in enrollment figures.

<u>**Recommendation #1: Teacher Training**</u>
Integrate gender training into new and existing teacher training modules.

This recommendation addresses the following recommendations from the 2004 Gender Assessment
- Review teacher training modules to determine if equity in the classroom is addressed; include new modules if not already being addressed.
- Include gender training as part of teacher training modules.
- Continue collaborating with health team RE: HIV and AIDS.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
IEP – Include gender training for teachers and indicators to measure in current RTI contract amendment.	Now – 10/05 (are preparing amendment).	David Farirai, Edu. Proj. Dev. Spec.; RTI	RTI, Subs, HEI's, SO2, and DoE	Need to develop specific indicators	Resources are available
Teacher Peer Education – Determine if PEPFAR Solidarity Centre Peer Education programs can be a model for possible future DoE support					
DoE support for HIV study (Specific to female teachers in rural areas) Provide TA to DoE for further analysis of HIV study results and action plan to assist teachers.	11/05-04/06	Mathata Madibane, Edu. Proj. Dev. Spec. DoE	Mathata Madibane DoE S02 Team ELRC	None	DoE staffing changes are complete. MTT is up and running – or we can use other mechanisms.

<u>**Recommendation #2: Life Skills Programs**</u>
Support life skills programs that examine masculine/feminine identity behaviors for learners.[5]

This recommendation addresses the following recommendations from the 2004 Gender Assessment

- Replicate "Men as Partners" model.
- Support life skills programs for boys that examine masculine/feminine identify and behaviors.
- Develop mentorship/role model program.
- (Through other USAID funding or IEP grants) Address gender violence in schools.
- Continue collaborating with health team RE: HIV and AIDS.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
Continue to develop PEPFAR-supported peer education activities with DoE. (Upcoming workshop with DOE and NGOs doing Life Skills and Peer Education) Also invite HSRC resource people on HIV and AIDS and Gender; also invite MAP. Provide further support to HERO (Help Educate at-Risk Orphans and Vulnerable Children) – boys mentoring and scholarship (MAP is also working here). Further support to higher education – life skills in universities for men and women GAP: SGB training – working with parents.	11/05-04/06	Mathata Madibane, Edu. Proj. Dev. Spec. DoE	DoE S02 and SO3 Teams NGOs (name?) HEI's Other Mission Offices (OOAA, PPDO, etc.)	Indicators to be developed for NGOs Indicators for Peer Education are PEPFAR	Changes in DoE are settled

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[5] The team discussed whether it could be feasible to also address these issues with parents. This can be discussed with the basic ed. Project contractor, RTI.

Recommendation #3: Girls in Math and Science
Support strategies that would address barriers
that deter girls from studying math and science

This recommendation addresses the following recommendations from the 2004 Gender Assessment

- Support strategies that would address barriers that deter girls from studying math and science.
- Develop mentorship/role model program.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
Work with NGO implementers to suggest/develop mentoring or other actions – AGSP, HERO, Mindset, RTI.	Now (AGSP, HERO, and Mindset are all new. Gender ideas can be put into their Action Plans).	CTOs	SO2	Winrock database (AGSP) HERO and Mindset indicators to be developed.	Partner cooperation.

Recommendation #4:
Support research study on the impact in communities most hard hit by HIV and AIDS as a follow-up to the 2005 HSRC HIV and AIDS study.

This recommendation addresses the following recommendations from the 2004 Gender Assessment:

- Support research on boys' secondary school enrollment and completion; design activities to increase retention.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
Determine DoE wishes/needs for USAID involvement; TA to design study? Actually participate in study?	Within 6 months (before 04/06)	SO2 and DoE	ELRC (teacher unions, DoE) SO2 SO4	Based on SOW questions	DoE Leadership

Observations from the Gender Training & TA Team: The Education Team seems reasonably well-grounded in understanding of gender as it relates to development and able to

integrate gender considerations into their planning. The items in the action plan being implemented seem realistic and will likely be implemented. In many cases, action steps build upon projects or activities that are already in the pipeline or about to begin. The team is also already working with the health team and will continue to strengthen this SO3-SO4 collaboration. The team is already involved with teacher development and peer education programs, with new phases about to be implemented, thus making gender-related curriculum changes feasible. Although funds may be needed for some actions, the team is already engaged in exploring use of PEPFAR funds for HIV/AIDS activities aimed at gender and the mitigation of HIV/AIDS. Further support through the Global Development Alliance and its new public-private partnerships can also help to support efforts to address gender-based violence through scholarship and mentorship programs.

Resources Provided to the Education Team
by the Gender Training & TA Team
October 2005

✓ **Beyond Enrollment: A Handbook for Improving Girls' Experiences in Primary Classrooms**, ABEL Project, USAID.

✓ **Exploring and Understanding Gender in Education**: A Qualitative Research Manual for Education Practitioners and Gender Focal Points, UNESCO Bangkok.

✓ **Groundwork: Participatory Research for Girls' Education**, The World Bank.

✓ **Learning & Information Pack, Gender Mainstreaming**, UNDP Gender in Development Programme, September 2000.

Criteria for an Engendered Curriculum

As appropriate, depending upon the subject of the course, the curriculum will:

- Disaggregate the information by women and men.

- Illustrate the importance of sex-disaggregated data.

- Show the challenges of gathering statistics on rural women, their needs and perspectives (examples: research methods, sex of interviewers, interviewing of each sex separately).

- Identify which sex does which activities.

- Illustrate the degree of participation and decision-making for women and men at all levels.

- Identify gender stereotypes, such as submissive or domestic roles for women or aggressive or controlling roles for men.

- Show how the labor roles of men and women differ.

- Identify the different effects of various topics and activities on women and on men.

- Identify how men and women might view the topics from different perspectives or define problems differently.

- Show how the labor roles of women and men differ.

- Illustrate how each sex has access to different types of resources.

- Illustrate how each sex has control over different types of resources.

- Illustrate how each sex has or does not have the opportunity to benefit equally from a project.

- Illustrate the differing time burdens for the expected (and stereotyped) activities and responsibilities of each sex.

- Identify the effects of a project on the relationship between women and men.

- Illustrate how equality of numbers does not always provide equality of opportunity and access.

- Show how a project can contribute to greater equality between women and men.

5. HEALTH SECTOR (SO3): REPORT & MATERIALS

In addition to PEPFAR activities, the Health Team's portfolio includes child survival, population, infectious disease/TB, and child survival/maternal health. This report is based on information collected during consultation meetings, training and the S03 Action Plan developed during the facilitated working session.

Gender Issues in the Health Sector: The SO3 team highlighted four areas:
  - ➤ Exploring opportunities to more effectively integrate gender into health service delivery.
  - ➤ Increasing male involvement in community-based caregiving and improve their health-seeking behavior for TB and HIV/AIDS.
  - ➤ Providing tools to community-based care partners (NGOs) to incorporate gender in activities and to analyze and use sex-disaggregated statistics in identifying gaps in service delivery.
  - ➤ Incorporating gender-based violence (GBV) interventions in selected programs.

Discussion of Action Plan: The Health Team focused on strengthening what is already underway with scores of partner organizations by supporting improved incorporation of gender issues in programming and by sharing research results on new initiatives such as the Men As Partners (MAP) activities. Many of their activities are related to PEPFAR (President's Emergency Program for AIDS Relief), for which more than 70% of the South Africa Mission budget is allocated. This provides both opportunities and constraints, as the indicators are determined by OGAC. PEPFAR also funds AIDS-related activities in other Mission sectors.

Prior to developing their Action Plan, the Health Team reviewed 15 recommendations from the 2004 Gender Assessment Report and identified a number that were outside their mandate or no longer relevant. Their Action Plan reflects and responds to (1) SO3 Objectives, (2) the Africa Strategy that requires a focus on programs in order to demonstrate greater equitable impact, and (3) the Mission Order regarding integrating gender into USAID's South Africa Program Portfolio.

**The Health Team
ACTION PLAN RECOMMENDATIONS**

1. Support the expansion of the MAP program, which will depend on availability of funds provided by OGAC to Engender Health. The SO Team will explore potential partners to use the Engender Health MAP model in this expansion.
2. Disseminate information on research and best practices and work with partners on identifying and incorporating gender issues in order to improve access to quality programs.
3. Provide tools to community-based partners (NGOs) to enhance their capacity in collecting, analyzing, and using sex-disaggregated statistics to identify and address inequalities in service provision.
4. Continue to support ideas on improving the health-seeking behavior of men and increasing male involvement in HIV/AIDS care-giving. The plan is to collect models of best practices, research findings and approaches to share with partners at annual technical meetings.
5. Support partners to address Gender Based Violence in selected programs. This will be done through training and sharing best practices. These activities will be realized if funding is available to support them.

Recommendation #1 Men As Partners (MAP):
Continue to support MAP program, using Engender Health model and expand if resources become available.

This recommendation addresses the following recommendations from the 2004 Gender Assessment: (1) Include RH instruction with ABC programs and (2) Link advocacy for ABC with awareness-raising for men and boys, similar to content of MAP program.

Steps To Achievement	Timeline	Responsible Person	How To Measure	Assumptions	Actions
If funding available, discuss expansion options with Engender Health. Use Interagency Working Group (IGWG) study on gender impact and the Population Council Impact study of interventions to guide future USAID planning. Monitor MAP expansion.	Yearly planning, monitoring via annual and semi-annual reports. Semi-annual reports.	Activity Manager M&E Advisor	Success stories Press USAID reports	MAP is a priority program or model to expand when resources are available OGAC approves additional funds for Engender Health and other potential partners	Identify other potential partners for expansion of the MAP model Meet with Engender Health regarding expansion and training capacity

Recommendation #2 Community-Based Health Care:
Disseminate information and work with partners on identifying and
incorporating gender issues
in order to improve access to quality programs and provide tools to community-
based partners (NGOs) to enhance their capacity in collecting, analyzing, and
using sex-disaggregated statistics
to identify and address inequalities in service provision.

The recommendation addresses the following recommendations from the 2004 Gender Assessment: (1) Expand support for CBOs and FBOs for community-based care activities and counseling for people with HIV/AIDS and (2) Expand support for people with HIV and those living positively with AIDS to include men and men's groups.

Steps To Achievement	Timeline	Responsible Person	How To Measure	Assumptions	Actions
Disseminate Population Council reports on grandparents as caregivers. Disseminate information from Departments of Health and Social Development regarding guidelines on care and OVC, both of which contain elements of gender. Work with community care NGO partners on gender issues, share best practices.	Semi-annual reports Annual reports	Activity Manager M&E Advisor Team Leader	Sex-disaggregated statistics on community based care and OVC for providers and recipients. Partners use statistics collected.	Most home care givers are women volunteers and role of men may be limited.	Continue to: Share latest research of care/OVC issues at next partners' meeting Encourage partners to involve men as caregivers Share reports on involving men as caregivers

<u>Recommendation #3 Health Seeking Behavior of Men:</u>
**Continue to support ideas on improving the health-seeking behavior of men
and increasing male involvement in HIV/AIDS caregiving.**

The recommendation addresses the following recommendations for 2004 Gender
Assessment: (1) Extend the MAP program to more communities and to other USAID
supported programs as an example of "best practices," (2) Target the men's partners to
improve their understanding of the importance of changing men's behaviors, and (3) include
men's groups in HIV/AIDS counseling to demonstrate at community level that men can help
in nursing the sick.

Steps To Achievement	Timeline	Responsible Person	How To Measure	Assumptions	Actions
Continue to look at best practices and ideas on gender approaches from around the world.	Semi-annual reports Annual reports	Activity Manager M&E Advisor Team Leader	Sex disaggregated statistics for providers recipients	Men seek care at a later stage of illness than women	Share reports and current research at technical annual partner meetings. Encourage partners to ensure equity in service delivery.

Recommendation #4 Increase Partners' Integration of Gender and Gender Competency:
Support partners to address Gender Based Violence in selected programs.

This recommendation addresses the following recommendations from the 2004 Gender Assessment. There were two types of lists in the recommendation section of the Assessment: health issues and health recommendations.

Steps To Achievement	Timeline	Responsible Person	How To Measure	Assumptions	Actions
Continue to include GBV in selected programs.	Semi-annual reports Annual reports	Activity Manager M&E Advisor Team Leader	Sex-disaggregated statistics	OGAC will support funding for GBV	Share IEC and media materials among partners More regular sharing of best practices on gender with partners Continue to include gender in semi-annual and annual reporting Ask Engender Health to conduct training at partner meetings Ensure Health Team members are on the IGWG list serve and materials are forwarded to partners (Action: Dalene)

Comments from the Health Team on Eliminated Recommendations from 2004 Gender Assessment Report. There were two types of lists in the Assessment Report – health issues and health recommendations. While the issues lists were fairly standard, the recommendations column varied greatly. Sometimes there were four recommendations

and sometimes five, and they were slightly different in each of the numerous places they were listed. In responding to the Assessment recommendations, the Health Team attempted to improve uniformity.

Recommendations from 2004 Assessment Team	Comments from Health Team
1. Develop specialized gender competency on the S03 Sector Team.	Competency within the team already exists. See action plan above for description of actions to assist partners to facilitate integration of gender in their programs.
2. PMTCT services and the involvement of men. The recommendations were on increasing couple counseling and testing and training for VCT providers to be offered to both men and women.	These recommendations are not relevant because what was being recommended had been going on two years before the gender assessment and the team considers PMTCT and VCT important models for involving both men and women.
3. Women between the ages 15-24 have a higher number of HIV infections than men of the same age. Recommendations were to accelerate promotion of PMTCT for rural women and access to Nevirapine or other drugs of choice, continue support of research on side effects of Nevirapine and support for acceleration of access to ARV.	Higher number of 15-24 women infected with HIV is due to violence and effects of economic disparities, among other reasons. The recommendations then should focus on addressing the causal factors and care and treatments of women of that age, which the team is doing. Support for activities, such as training, can be done if requested by the NDOH.
4. ABC programs have contributed to delaying sexual encounters but women have no control over their reproductive and health rights. Recommendations were to include Reproductive Health Instruction and RHR instruction with ABC programs and link advocacy for ABC awareness raising for men and boys as is done in the MAP program.	At this time and under OGAC guidelines, it is impossible to include reproductive health in ABC programs. Focus should be on both sexes in school and out of school, including teachers. MAP is targeting men.
5. Recommendation to compare results of previous research of to the results of the current RHRU research on herpes infection among women to support prevention of herpes infection as a prevention of HIV.	This research is not being done with PEPFAR support.

Observations from the Gender Training & TA Team: In terms of gender competency, the team members have had training and experience in integrating gender in programs, which enables them to support team and partner efforts in ensuring more gender sensitive planning, implementation and reporting of results. A PMTCT service supported by USAID is one of the success stories where involvement of men and female partners has been achieved.

Regarding the collection, analysis, and use of sex-disaggregated statistics, the Office of the Global AIDS Coordinator (OGAC) under PEPFAR dictates the majority of statistics collected by the USAID Health Team. Because factors related to gender play such a key role in the HIV/AIDS epidemic, great effort has been made to disaggregate all possible statistics by sex and a limited number of indicators by age and pregnancy status. At the USAID South Africa level, the team has been able to do only limited analysis of statistics due

to multiple factors: (1) The program is only one and a half years into the implementation of PEPFAR, and collects statistics only on a semi-annual basis. Statistics are now being collected for the second annual report or the second major set of statistics. Much of the analysis will be based on trends, and for that to take place, multiple years/sets of statistics will be needed. (2) Because of the fact that the PEPFAR indicators are new, as well as the various disaggregations, the USAID team has spent much of its time doing training and capacity building around M&E to ensure quality statistics are being reported and that the analysis is useful. Although Activity Managers have been monitoring the statistics reported by partners and particularly the sex and age disaggregation, this information will become more meaningful in the next few reporting periods, especially in terms of ARV service delivery where a more expanded statistics are collected.

At the partner level, where program implementation is taking place, most partners are collecting statistics on a monthly or quarterly basis and are monitoring trends at more frequent intervals. This allows them to incorporate necessary changes into program implementation. The focus of the M&E trainings is to assist partners use M&E to improve programs by laying out M&E plans to ensure this process happens. Many partners are acutely aware of gender issues and are watching these statistics closely. Projects such as Right to Care, PHRU, RHRU and the Men as Partners program work to improve the gender balance. Some partners have world-renowned researchers who have produced a significant amount of research on these very topics, which the Health Team is sharing with partners.

Health & HIV/AIDS Training Resources
Provided to the Health Team
October 2005

*Some documents or CDs may be in the office of the Gender Focal Point. Many of these materials may be useful for partner organizations. Two of the Gender Team members specialize in health, and many of the materials came from a recent Global Health conference.

Gender, HIV/AIDS and Rights: Training Manual for the Media, Inter Press Service, www.ipsnews.net

Designing HIV/AIDS Intervention Studies: An Operations Research Handbook, Population Council, www.popcouncil.org

Developing Materials on HIV/AIDS/STIs for Low-Literate Audiences, PATH and Family Health International, 2002, wwwfhi.org, www.path.org

Disentangling HIV and AIDS in Ethiopia, Tanzania and Zambia, CHANGE, International Center for Research on Women, www.icrw.org

Expanding the Care Continuum for HIV/AIDS: Bringing Carers into Focus, Horizons Program, International Center for Research on Women, www.icrw.org

Facing the Future Together: Report of the Secretary General's Task Force on Women, Girls and HIV/AIDS in Southern Africa, UNAIDS.

HIV/AIDS Policy Fact Sheets, Kaiser Family Foundation, October 2005.

Home Care for PLWHA: The Power of Our Community: Integrating Reproductive Health and HIV/AIDS for NGOs, FBOs, and CBOs, Vol. IV, CEDPA, The Enable Project: Enabling Change for Women's Reproductive Health, www.CEDPA.org

How to Integrate Gender into HIV/AIDS Programs: Using Lessons Learned from UNSAIOD and Partner Organizations, May 2004, Interagency Gender Working Group, www.igwg.org

Integrating Gender into HIV/AIDS Programmes: Review Paper for Expert Consultation, June 2002, Department of Gender and Women's Health, Family and Community Health Cluster, World Health Organization.

A Manual for Integrating Gender Into Reproductive Health and HIV Programs: From Commitment to Action, Interagency Gender Working Group, December 2002, www.igwg.org

Partners for Positive Action: Social Mobilization for HIV/AIDS Prevention, Care & Support: Integrating Reproductive Health and HIV/AIDS for NGOs, FBOs, and CBOs,

Women and HIV/AIDS: Confronting the Crisis: A Joint Report by UNAIDS/UNFPA/UNIFEM, 2004, www.unaids.org, www.unfpa.lorg, www.unifem.org

Working with Men, Responding to AIDS: Gender, Sexuality, and HIV, A Case Study Collection, International HIV/AIDS Alliance, www.aidsalliance.org

Vol. IV, CEDPA, The Enable Project: Enabling Change for Women's Reproductive Health, www.CEDPA.org

CD-ROMS

- ✓ AIDSQUEST: The HIV/AIDS Survey Library, HORIZONS, June 2004, www.icrw.org

- ✓ BASICS II, PROJECT CD-ROM, JUNE 2004

- ✓ The ENABLE Project: Enabling Change for Women's Reproductive Health, www.cedpa.org

- ✓ Findings from the Field: A Compilation of Publications on HIV/AIDS, June 2004, Population Council. www.popcouncil.org

- ✓ Involving Men in Sexual & Reproductive Health: An Orientation Guide by the Men and Reproductive Health Subcommittee, USAID Interagency Gender Working Group, www.igwg.org

- ✓ Publications and Materials from Pathfinder and CATALYST, Pathfinder International, Reproductive Health for Refugees Consortium, www.rhrc.org

- ✓ Stages, Steps and Tools: A Practical Guide to Facilitate Improved Performance of Healthcare Providers Worldwide, PRIME II Project, www.prime2.org

- ✓ Transfer of Learning: A Guide for Strengthening the Performance of Health Care Workers, the PRIME II Project, www.prime2.org

Ideas & Suggestions for Involving Men
In Health Programs

Note: These ideas culled from many sources may/may not have negative implications for girls and women and need to be explored in each culture before proceeding.

✓ Increase data on males. Men and boys are seldom mentioned in the literature on development and reproductive health. When they are mentioned, they are often portrayed as violent, promiscuous and irresponsible.

✓ Educate men as to the negative health and social consequences for males of substance abuse, occupational health issues, alcoholism, machismo, violence, promiscuity, and reluctance to seek treatment.

✓ Establish family-centered care facilities to avoid perception of "women's center."

✓ Promote equal involvement for men and women in an abortion, including counseling and addressing men's emotional needs. Use the situation as an opportunity to increase family planning use.

✓ Provide positive images of males, such as www.mencanstoprape.com.

✓ Both sexes are more likely to participate in health education and attend clinics that address multiple health needs, not only RH needs.

✓ Train male police officers in leadership roles they can play in promoting RH human rights.

✓ Where appropriate, promote joint decision-making on family planning for couples's matters.

✓ Educate men about the myth that they can easily identify and avoid high-risk partners.

✓ In condom programmes, avoid sanctioning promiscuous sex or promoting a sexual double standard.

✓ Examine ways to increase male staffing without having a negative impact on women's volunteer and paid work.

✓ Carefully consider the consequences of programmes that challenge male authority in traditional cultures and may inadvertently result in increased domestic violence.

✓ Eliminate the "deficit" model for men when they are seen as obstacles rather than the resources for improving lives of women and children.

✓ Change the indicators for RH program success from female-oriented contraceptive prevalence to more socially-oriented RH indicators, such as the number of men who accompany women to the clinic.

✓ Involve men as actors, as well as beneficiaries, of family planning: trainers, counselors, role models, evaluators, etc.

✓ If conducting STI tests, such as for syphilis or HIV, consider announcing the results for men first so that women will not be blamed.

✓ Use men as peer counselors for other males.

✓ Provide opportunities for men to express their anxieties about sexuality and sexual relationships.

✓ Help men explore the complementary roles of younger and older men in RH. Example: Safe Crossings: Stepping Stones curriculum and approach to involving men in the prevention of violence and HIV transmission, ActionAid, December 2000. http://www.stratshope.org/ssinfo.html.

✓ Find out more about men's attitudes and behaviour.

✓ Have mixed sex staff to model men and women working together with respect and equity.

✓ Encourage males with authority or respect to speak out publicly against stigmatizing males and females with HIV.

✓ Give awards and public acknowledgement for those men who are positive role models.

✓ Avoid positioning men as irresponsible, uncaring, and without feelings about abortion, family planning, or having children. Build campaigns that assume that they want to be caring partners and husbands.

✓ Emphasize greater sexual enjoyment after vasectomy by eliminating worries about unwanted pregnancy.

✓ Reach men in workplaces, small businesses, truck stops, military bases, bars, recreation facilities, and sports events.

✓ Train health workers in addressing stereotypes that blame women victims of violence or trivialize their experience.

✓ Offer men a broad range of reproductive health services, including urological problems, STIs, infertility testing, and help with sexual dysfunctions.

✓ Train men as community health workers to teach other men about RH (Mexico).

✓ Focus on why men do use condoms or support family planning rather than why they do not.

✓ Provide opportunities for men to learn to care for others.

✓ Publish posters with signatures of men who want to put an end to violence against women.

✓ Train counselors in improving communications and decision-making skills for couples.

✓ Support men's positive actions and help them to influence other males.

✓ Inform men about vasectomy and the increased risk of sterilization for women. Urge concern for their partners.

✓ Target teachers to speak out about exploitation in sexual relationships.

✓ Help men question their risk-taking behavior.

✓ Address directly objectives to condoms, such as fear of loss or sensation.

✓ Be cautious about encouraging men to take control of family planning in ways that may decrease collaborative decision-making and disempower women.

✓ Decrease provider bias against condoms.

✓ Train providers to teach condom-negotiation skills for women and men.

✓ Provide men with basic information about male and female reproductive physiology.

Younger Men

✓ Help boys see the costs of traditional views of manhood for their lives, spelling that out for them.

✓ Explore working with boys alone in some areas on health-related themes. Then work with boys and girls together on relationship issues, gender equity, and attitudes.

✓ Target social marketing to adolescents, such as designated youth condoms.

✓ Use caution in associating condoms only with STIs and AIDS that can have secondary effects on people's reputations for using or not using them.

✓ Present an image of a clinic that serves younger people at certain times. Perhaps have a separate entrance. Learn about which sex of counselors boys would prefer.

✓ Provide young men with better information or better services on sexual and reproductive health.

✓ Increase numbers of male clinic staff who understand boys' needs and can serve as role models.

✓ Do outreach projects to promote sexual and reproductive health in settings where young men regularly meet.

✓ Promote and support positive male "role models" in families for the younger boys and siblings to emulate.

✓ Conduct youth-to-youth projects, including peer education.

✓ Develop a "straight talk" insert in a government newspaper as a forum for young people's opinions and concerns about sexuality and relationships. (Ministry of Information, Uganda)

✓ In Brazil, people have begun to identify young men who do not demonstrate negative characteristics associated with masculinity. Programs could build on potential role models who reject aggression and seek more participation in family life and childcare.

✓ (Men Make A Difference: Objectives and Ideas for Action)

✓ Identify the needs of adolescent boys in a community.

Expectant, New and Not-so-new Fathers

✓ Help couples – individually and together -- to identify the role they want for men in pregnancy and childbirth.

✓ Encourage couples to identify such male roles as ensuring speedy and adequate transport to a health care facility, helping provide household help during pregnancy, being present at the birth. (Studies show later involvement of men who are present at the birth.).

✓ Explore early fatherhood roles before the child goes to school or can play sports.

✓ Help men understand the needs and dangers of pregnancy, including pre- and antenatal care, good nutrition, sufficient rest, early medical help for complications, and skills of caregiving.

✓ Encourage women to identify how they need help and what role they would like their partners to play in pre- and antenatal periods.

✓ Emphasize men's roles in caring for children, not solely in providing financial support.

✓ Encourage men to take their children to school.

✓ Help men reflect on what kind of fathers they want to be.

✓ Help broaden the image of the traditional roles for fathers, including caring, emotional expression and involvement, and opportunities to learn to care for others.

✓ Reach out to fathers of new babies and help them stay involved with their children.

✓ Help clinics develop a list of tasks in the RH clinics that could reflect the importance of men in RH, pregnancy and childbirth.

✓ Increase provision of parental leave for men.

✓ Increase public awareness of importance and types of roles for fathers.

✓ Educate men by drawing on their concern for the health of their unborn children. (Zambian campaign to combat maternal syphilis.)

6. ECONOMIC GROWTH AND EMPLOYMENT (SO4 & SO9) REPORT

Gender Issues in the Economic Growth and Employment Sector

Based on meetings, training, and facilitated working sessions, the key gender-related areas in Economic Growth, as highlighted by the SO4/SO9 team, appears to be:

- Impact of HIV/AIDS on the economy, including employment
- Differences in economic opportunities for women and men
- Gender-sensitivity in the workplace, including family-friendly policies, sex discrimination, etc.
- The analysis and use of sex-disaggregated statistics and gender data in studies

Key points from EG Action Plan

The 2004 Gender Assessment included five recommendations for the Economic Growth SO4 and five recommendations for the Employment SO9. To develop their Action Plan for integrating gender into SO4/SO9 activities, the EG Team examined these recommendations and consolidated them to reflect their current activities. They already had completed several recommendations such as those on parliamentary training, and some research.

The Economic Growth Team
ACTION PLAN RECOMMENDATIONS

1. Gender in Training: Whenever training (broadly defined as long or short term, internships, work-study, workforce development, etc.) is being considered, EG will provide recommendations and guidance for inclusion of appropriate gender specific components.
2. SAIBL program (Partner: CCA and ECI) to strengthen the collection, analysis and reporting on sex-disaggregated statistics and gender data and adjust implementation based on findings. (Recommendation 2 will be expanded to include subsequent partners/programs under the new strategy once new strategy is in place.)
3. Gender in Studies: Whenever studies (broadly defined as reports, analyses, papers, assessments, etc.) are being considered and designed, EG will include in the task order or SOW, recommendations and guidance for inclusion of appropriate gender specific considerations therein in terms of both "gender as a variable" and the issue of gender equality.

EG Recommendations

The three Action Plan recommendations are based on the ten recommendations contained in the 2004 Gender Assessment.

Recommendation #1:
Gender in Training: Whenever training (broadly defined as long or short term, internships, work-study, workforce development, etc.) is being considered, EG will provide recommendations and guidance for inclusion of appropriate gender specific components.

This recommendation addresses and generalizes the following 2004 Gender Assessment recommendation for all training activities
- Include analysis of national budgets evaluating their relative impact on women and men in macroeconomics training.

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
Consult with EDU team Create checklist for handout to partners when needed Incorporate into all SOWs, agreements, etc.	By Dec 31 By Dec 31 Prior to approval of subsequent SOWs, agreements, etc.	For All Steps • CTO • EG Gender Point	(CO, RLA and front office if/as necessary)	Completed checklist Sections seen in SOWs, agreements, etc.	If for RSA government work, will have concurrence by RSAG If non-gov, will have concurrence by clients and partners.

<u>**Recommendation #2:**</u>
SAIBL program (Partner: CCA and ECI) to strengthen the collection, analysis and reporting on sex-disaggregated statistics and gender data and adjust implementation based on findings. (Recommendation 2 will be expanded to include subsequent partners/programs under the new strategy once new strategy is in place.)

This recommendation addresses the following 2004 Gender Assessment recommendation
- Encourage SIBL clients to train and promote women and men into technical and managerial jobs previously closed to them
- Encourage client groups to provide support to women participants

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
Discussions with partner Discussions with RLA and CO Statistical collection, analysis and report Revision of work-plan as needed Implementation of revised workplan DQA	January	CTO SAIBL/Core CTO SAIBL/PAL	ECI and CCA (partner) PPDO DQA Team	Agreement with CCA and ECI on the steps CO and RLA concurrence Final report Revised work-plan if needed Positive DQA report	ECI Gender advisor is in place. That the CCA and ECI cooperative agreement parameters & resources will support the changes needed to the work-plan

<u>**Recommendation #3:**</u>

Gender in Studies: Whenever studies (broadly defined as reports, analyses, papers, assessments, etc.) are being considered and designed, EG will include in the task order or SOW, recommendations and guidance for inclusion of appropriate gender-specific considerations therein in terms of both "gender as a variable" and the issue of gender equality .

This recommendation is an overall recommendation to ensure ongoing gender integration in all types of studies conducted by SO4/SO9. This recommendation addresses the following the 2004 Gender Assessment recommendation

- Carry out analysis of relative success of men and women-owned businesses
- Analyze statistics on women's access to financing to determine if there are gender differences in access to loans

Steps To Achievement	Timeline	Who Responsible	Who Else Involved	Measures Of Progress	Assumptions
Include in all subsequent task orders and SOWs	NA (as studies are being considered)	CTO EG Gender Point	Implementing partner	As seen in tasks orders and SOWs	Researcher with adequate gender background found to do the studies

The recommendation for MINDSET to increase entry of women into agricultural fields of study is being implemented under the new SO. The following Gender Assessment recommendations either have been completed, are no longer relevant due to completion of certain activities.

- Provide gender training as part of Parliamentarians course
- Networking and career building for scholars, both female and male, and analysis of sub-specialties and job placement of students
- Conducting additional research on gender issues in trade

7. REGIONAL HIV/AIDS PROGRAM (RHAP) REPORT

The Regional HIV/AIDS Program Team Action Plan

1. Continue to strengthen institutional partners' capacity for gender integration, including (a) identify gender strengths and weaknesses of implementation partner work plans, (b) conduct gender training at a partners' monthly meeting, (c) incorporate gender in organizations' program descriptions (Pact), and (d) disaggregate statistics in the annual reports.

2. Continue looking for opportunities to integrate gender in the PMP process and reporting to OGAC.

3. Look for opportunities to integrate gender in the Five Year Strategic Plan for Swaziland and Lesotho.

4. Increase RHAP team awareness and capacity for gender integration, e.g., through gender training at partners' monthly meeting.

5. Influencing Development regional gender sensitive policies to support human resource development.

6. Identify CBOs in Lesotho and Swaziland that have a solid reputation on gender and find ways of supporting them to become gender champions.

1. CONSIDERATIONS IN DESIGNING GENDER TRAINING

The best training design begins with the learners –
what they need to know, what they need to do, what they need to remember.

✓ Start with the <u>learners and how they learn in different ways, such as </u>Myers-Briggs preferences, the Kolb learning model (experience, observe, analyze, apply), visual/auditory/kinesthetic learning, left brain/right brain.

✓ Help them learn to ask the right questions about gender as they do their work, not learn about gender as an academic field.

✓ Focus on the objectives of the project and how gender can be incorporated at every stage of the Project Cycle, rather than "gender" as a discrete exercise attached to the objectives.

✓ Keep the design simple, so the design can be easily adapted, expanded or contracted.

✓ Use participants' material and examples as much as possible, and when using trainer examples, ask if anyone has had a similar experience.

✓ Incorporate many types of examples from different sectors, delve deep into each one and use each example as a way to relate to the tasks in the Project Cycle and to classify projects according to Results from a gender perspective.

✓ Use vivid examples and visuals that they will remember a week, a month, a year from now.

✓ Incorporate humor where appropriate.

✓ Link gender to personal and real life experiences that they recognize.

✓ Keep the design highly participatory so that they have practice in application of learning.

✓ Recognize how they will use the learning in their day-to-day work.

2. THE CRIB SHEET: TOOL FOR ANALYZING GENDER FACTORS IN PROJECT CYCLE

The CRIB Sheet*

A Simple Tool for Remembering the Kinds of Questions to Ask
About Gender Factors in the Project Cycle

C

Cultural Roles & Practices

Examples:

How do cultural expectations about roles and responsibilities influence the resources, involvement, and benefits of women and men involved in and affected by the project?

How do they restrict each sex or provide opportunities?

How do they affect the design, implementation, and results of the project?

Who is consulted? Who decides what? Who does what? Who controls what?

Who has traditional access (or needs permission to access)?

R

Rights & Resources

(Money, Credit, Training, Information, Transportation, Time)

Examples:

Who has legal rights? Customary rights? Which rights provide or restrict opportunities?

Which resources are involved? Who has access to them? Who controls them?

Who decides how money is spent?

How does access to transportation affect the project?

How does time as a resource affect the project?

Are resources connected with the appropriate people who do the work?

Does access to training resources take account of cultural and family roles?

I

Involvement:

Examples:

Who is involved in defining the problem? Who talks to researchers?

Who is involved in conducting research? Who is asking the questions of which sex?

Who designs the data collection process? Who decides which data is collected?

In project activities, who is involved in leadership? In decision-making? In project activities? In staff meetings? Is involvement active or passive? Who participates in information flow and control?

Who is involved in designing the project? Implementing the program? Monitoring the program?

Who is involved in designing and participating in the evaluation?

B

Benefits & Power

Examples:

Who benefits directly from the project? Who benefits indirectly?

Who benefits from the way it is carried out?

Who benefits short-term? Long-term?

What happens to the relative status and power relationships between the sexes?

*Crib Sheet (slang): A brief paper of tips used by students in preparing for an exam.

3. GENDER CHECKLIST: FOR ORGANIZING AND CONDUCTING TRAINING PROGRAMS

To ensure that gender is taken into consideration, the following is intended as a brief list of questions to ask when setting up and conducting training. Whether you are organizing or conducting training, it is important to go beyond sex-disaggregated data for participants. Many other gender considerations can impact the success or failure of a training program.

The list uses the framework of the simple CRIB (culture, rights & resources, involvement, benefits) as a check for asking the right questions. Every CRIB question may not be necessary for every part of the training.

<div align="center">

The CRIB
C = Cultural Roles & Practices
R = Rights & Resources
I = Involvement
B = Benefit

</div>

Cultural Roles & Practices:

Designing Training

- What are the cultural roles and traditions of different participants that might affect the design?
- Does the design consider the experience and needs of each sex?
- What are the organizational cultural factors that might affect the design for each sex?

Promoting the Training

- Are you training in non-traditional subjects for either sex so that extra promotion efforts are needed?
- Where and how would you promote it in places where different sexes will be exposed to the material?
- Will literacy rates for either sex affect the training or its promotion?

Selecting Participants

- Are there cultural practices that affect who in the family controls the money to attend the training program?
- Are there cultural practices affecting who makes decisions about a family member attending a training, especially if it is away from home?
- Will parental customs about clothes for each sex affect who feels comfortable in attending? (Example: Girls or boys with tattered clothing that may be immodest or cause embarrassment.)
- Will either sex have safety issues in getting to the training?
- Are there cultural practices that affect the mixing of the sexes?

Logistics & Facilities

- Are there cultural practices about care of the children that affect whether a person can attend?
- Are there cultural practices that imply children must accompany a parent to the training and do you need to arrange for childcare?

<u>Selecting the Trainers</u>
- ☐ Do cultural practices affect how trainers/teachers of one sex relate to participants of the other sex?

<u>Evaluating the Training</u>
- ☐ Are there literacy factors that might affect one sex in choosing your method of evaluation of the training?
- ☐ Are there different cultural factors that would affect how each sex participates in an oral evaluation?

<u>Conducting the Training</u>
- ☐ Are there cultural stereotypes that suggest how each participant should behave in a training program, such as quality of participation especially with mixed sex groups?
- ☐ Do cultural roles affect how each sex participates?

Resources & Rights:

<u>Resource Materials in the Training</u>
- ☐ Will the design include required resources that promote gender in an equitable way or avoid gender stereotypes?

<u>Financial Resources of the Participants</u>
- ☐ If there is a fee, will both sexes be able to afford it?
- ☐ Will both sexes be able to afford transportation to attend?

<u>Time Resources of the Participants</u>
- ☐ Will both sexes have the time away from their other chores to attend?

Involvement:

<u>Involvement in Design</u>
- ☐ Who helps design or review the design of the training?

<u>Involvement of Those People Most Affected or Able to Apply the Training</u>
- ☐ Who are the participants? Are they the people who will be most affected by or involved in the application of the training?

<u>Factors Affecting Awareness of and Involvement in the Training</u>
- ☐ Do literacy factors affect one sex's access to the training?
- ☐ Where is the training promoted to ensure participation?
- ☐ Are there different methods or locations where females or males may learn about the training?

Sex of Trainers Affecting Involvement

- What are the sexes of the trainers vs. the participants?
- Will one sex be seen as relating more easily to the sex of participants?
- In gender training, can male and female trainers model partnership roles for trainees?
- How is each sex involved? What is the quality of participation?
- Does the design encourage participation of each sex? (Example: females may sit at the back of the room, volunteer less often, speak more softly.)
- Will biological factors, such as color blindness, affect the materials used in the training? (Example: Up to 20% of males may be color blind that affects their ability to read flipcharts with red markers.)
- Will one sex be more likely to be assigned stereotyped domestic roles (bringing food, cleaning up) or financial roles in connection with the training rather than according to interests and skills?
- Will trainers encourage participation in ways that respect roles and practices of each sex? (Example: Is one sex encouraged to be silent before speaking or not to interrupt?)

Benefits:

- Who will benefit most and why?
- Are the people benefiting those most likely to use and apply the training?
- Will the benefits from the training ripple out to other members of the family or the community?
- Will one sex or the other be most likely to disseminate benefits of the training and to whom?
- Will the attendance of one sex or the other increase the number of positive role models needed for either sex?
- Will the benefits of the training lead to improved economic benefits for those who most need it?

4. SAMPLE GENDER TRAINING OBJECTIVES & CURRICULA

Sample Outline of Basic Gender Awareness Session (3 Hours)

RESULTS EXPECTED FOR PARTICIPANTS:
By the end of the session, the participants will be able to: ▪ Explain the importance of gender and how it relates to goals of effective development. ▪ Understand that gender factors apply to both sexes, not just to women. ▪ Develop a shared knowledge and common understanding with other participants of definitions and the difference between sex and gender. ▪ Identify ways to analyze country statistics for hidden gender factors. ▪ Explain where gender factors may affect the success of the project at any point in the Project Cycle. ▪ Categorizing projects as to the results by gender impact and cite examples of how projects can worsen gender inequalities, accommodate inequalities while improving conditions for one sex, or transform the relative status or power relationships between the sexes.
TRAINER'S OBJECTIVES:
▪ To put gender within the context of effective development – in other words, focus on why all USAID staff are here and how gender factors can help them improve their work. ▪ To help participants see gender as a critical factor, not as the prime objective of the majority of projects. ▪ To test and ensure common understanding of gender terms as sex/gender differences as the basis for follow-on gender work and technical assistance. ▪ To broaden participants' view of gender and gender stereotypes as affecting both males and females. ▪ To help participants relate to gender in a personal way and understand how gender roles/stereotypes have affected both men and women from childhood onward. ▪ To help participants, even those who know one another, to see each other in a new light based on their personal gender experiences. ▪ To introduce ways that gender factors are important in all aspects of the Project Cycle and to introduce ways to think about projects and how they do or could affect existing gender status and relative power between the sexes.

Agenda
1. Expectations (on cards as people arrive) 2. Welcome & Introductions 3. Expectations, Objectives, Agenda 4. What Is Gender? 5. Why Gender? Why Do We Care? 6. Analyzing Country Data: Hidden Gender Factors BREAK 7. The CRIB Sheet: Gender Factors in the Project Cycle 8. Classifying Project Results by Gender Equality

Sample Objectives for Sector Training & Action Planning Session
6 Hours
This sector session can also include the basic materials in the Overview Session.

Sector Gender Training & Action Planning Sessions

RESULTS EXPECTED FOR PARTICIPANTS

By the end of Sessions 2 and 3, the participants will be able to:

- Understand how gender stereotypes and societal expectations influence the choices and possibilities in the lives of both males and females, with examples from USAID staff experiences.
- Categorize and analyze results in hypothetical and current USAID projects as to their impact on gender status and relations.
- Identify where in the Project Cycle, USAID might intervene (or might have intervened) to improve the relative status or relations between the sexes.
- Cite and remember the four CRIB Sheet categories of types of gender questions to ask when designing, implementing, monitoring, or evaluating projects (CRIB: Culture, Rights & Resources, Involvement, and Benefits).
- Identify ways to measure the results of projects for gender equality, going beyond sex-disaggregated data.
- Complete an Action Plan for Integrating Gender in the Education Sector, including recommendations for the strategic planning process and possible ways that sectors can collaborate in collecting and analyzing data and implementing projects.

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5. SELF-ASSESSMENT INSTRUMENT RELEVANCE OF GENDER TO YOUR WORK*

The following questions should stimulate your thinking about gender. Developing a better understanding of gender can help USAID and its partners answer the following questions and thus improve project and program design and implementation

Directions: Read and reflect on the following questions and issues to consider. Then write down one or two points or ideas that relate to your work.

1. To what extent are you aware of men's and women's roles and responsibilities in relationship to sector activities/programs/projects?

Issues to consider:
- *Productive roles (paid work, self-employment, and subsistence production)*
- *Economic, family and household roles (domestic work, child care and care of the sick and elderly)*
- *Community participation/self-help (voluntary work for the benefit of the community as a whole)*
- *Community politics (decision-making/representation on behalf of the community as a whole)*
- *How roles and responsibilities are recognized and valued.*

2. To what livelihood assets or opportunities do women and men have access?

Issues to consider:
- *Human assets (e.g. health services, education)*
- *Natural assets (e.g. land)*
- *Social assets (e.g. social networks)*
- *Physical assets*
- *Financial assets (e.g. capital/income, credit)*

3. How do women and men use (or spend) their resources?

Issues to consider:
- *what goods and services men and women most value*

4. In what decision-making do men and/or women participate? What decision-making do men and/or women usually control? What constraints do they face?

Issues to consider:
- *Household level (e.g. decisions over household expenditure)*
- *Community level (e.g. decisions on the management of community water supplies)*

5. What are men's and women's perspectives on appropriate and sustainable ways of addressing their needs?

Issues to Consider:
- *Perspectives on delivery systems – choice of technology, location, cost of services, systems of operation, management and maintenance*

6. To what extent do cultural expectations effect women's and men's involvement in (your sector; your work; etc.)?

Issues to consider:

- *Expected roles and responsibilities*
- *Expected behaviours*
- *Expected use of time*

*This exercise is useful in first introducing people to the idea of gender. Adapted from: http://www.genie.ids.ac.uk/gem/index_sectors/infrastructure/in_tools1.htm

6.   SAMPLE EVALUATION FORM

Please take a few minutes to evaluate this workshop and make suggestions for future training.
Workshop Topic:
Date: Your Sector or Department:

My most valuable learning was….

I liked…..

I wished….

Most helpful was: Least helpful was:

On a scale of 1-5, rank the following (Not Positive 1 to Positive 5):

The information was relevant:

I believe I understand gender:

I have new ideas about gender:

The methods used were:

The session was worth my time:

Additional Comments:

7. INTEGRATING GENDER INTO EVALUATION – A PARTICIPATORY APPROACH

Several teams indicated their interest in learning more about integrating gender into evaluations and how to help their partners do this. In response to this request, one of the team members presented a case example illustrating a participatory process which she has been evolving over a number of years. Following are key aspects of that process.

What is Participatory Evaluation?

Many organizations have committed to using participatory monitoring and evaluation of their projects and programs. When applied to evaluation the term "participatory" implies the collaboration of those having a clear stake, or interest, in that which is being evaluated. Gender, as well as ethnicity, age, and other factors are major considerations in such an approach. The following aspects help to make evaluations make it *participatory*:

- The evaluation should be transparent, with all information openly shared throughout the process.
- The evaluation should be context-specific, rooted in the interests, concerns, and questions of the key stakeholders, especially those directly involved in the program or project being evaluated.
- Program staff and other key stakeholders and partners help to design the evaluation, determine key questions, and participate in group interviews, meetings, debriefs, analysis and write-up.
- The evaluation should emphasize collective methods of knowledge generation rather than basing results solely on the opinions and experience of outside evaluators.
- Program or project staff and other key stakeholders had the opportunity to review early findings, and to comment on early drafts of this report.
- All stakeholders who participate should learn of the results, in some form.

Appreciative Approach

The participatory evaluation methodology can be further strengthened by using an "appreciative approach" to examining the program or project. Those involved should be encouraged to focus on what has worked well and seek to discover why. The approach does not ignore problems but puts a learning frame around challenges and turns them into constructive hopes for the future. Rather than focusing on and dwelling on what went wrong, it encourages learning that leads to future improvements. This learning-focused method draws upon Appreciative Inquiry, an organization development approach that focuses on success instead of failure; what works instead of what does not. An appreciative approach seeks to find the root causes of success so that the program can build upon what works.

Utilization Focus

The evaluation increases the likelihood of results actually being used if it focuses on learning and utilization. From initial question development through to analysis, emphasis should be on how evaluation results could benefit and inform management decisions and meet other stakeholder needs. The stakeholder evaluation team should focus on consciously seeking to learn about what "it does not know," and not collect information that it already has.

Capacity Building Elements

While participating as evaluation team members, staff and partners learn about participatory evaluations by being a part of one. They also learn more about the program being evaluated.

An Outline of the Process

1. Develop a Draft Scope of Work
2. The host organization holds an initial stakeholder planning team meeting to:
   - Review and clarify purpose and expected outcomes of evaluation
   - Review appreciative and participatory processes
   - Review program history/timeline and discuss relevant documents available to team members
   - Identify questions and information sources (extremely important step – all stakeholders present should have input.
   - Clarify team roles: Planning? Implementation and analysis? Write-up and Presentation? Review? – Some stakeholders will participate on some of the teams only the Core Team of 6-10 people will participate in all – except for the review team.
   - Review schedule, travel plans, and other logistics
   - Clarifying expectations, questions, and concerns of team members
3. Refine Scope of Work
4. Conduct planning/capacity building workshop
   - Decide data collection methodology
   - Train all data collection team members
   - Decide team composition (consider who will be going where, gender, age, ethnicity, language abilities, familiarity with area, etc.)
   - Set schedule
   - Clarifying expectations, questions, and concerns of team members
5. Arrange travel logistics
6. Collect data
7. Collectively analyze and write-up
8. Present preliminary findings, conclusions, and recommendations to review team
9. Write final report and prepare other forms of presentation of results to all stakeholders.

Just The Basics

Gender & Why It Matters

Why the fuss about gender?

Gender is not a goal in itself,
but a contributor to more effective development.
It is one of the critical factors
that can influence whether a project succeeds or fails.

<u>What's In This Handbook?</u>

- What is gender? What is sex?
- Why do we care about gender in development?
- Are there official reasons why we need to care?
- Can statistics overlook hidden gender factors?
- Why is gender important in USAID's Project Cycle?
- Learning to ask the right questions: The CRIB Sheet
- Does your project help or hurt gender equality?

<u>What questions should I ask?</u>

This handbook outlines simple definitions,
ways to incorporate gender factors in development work,
and – most important – remembering
the right questions to ask.

WHAT IS GENDER? WHAT IS SEX?

Gender refers to the roles and expectations that a society constructs
for how a male or female should look or behave
or what roles and responsibilities they should have. It also refers to the relative status and
equality of relations between women and men.

USAID ADS Definition:
*The economic, political, and cultural attributes and opportunities associated with being male or female.
The social definitions of what it means to be male or female vary among cultures
and change over time. (USAID ADS 200-203)*

Sex is usually fixed at birth,
while expectations about gender roles change —
in different families, across different cultures, at different times in history.

Changing Roles

In the 2004 Tsunami, many more women than men died because of their location near the sea
or trying to gather up their children. Many surviving men in those countries were required to
take on new household roles with their remaining children and members of their families.
Likewise, when men go to war or seek work elsewhere in a country, women take on new roles
in the family.

Differences between Gender and Sex

Sex	Gender Roles for Females & Males
Biological	Socially-constructed
Universal	Can be changed
From birth	Vary in different cultures
	Can change over time, history
	Can change with dramatic events (war, disasters, epidemics)

Did you know?
At the beginning of the 1900s, pink was the color associated with men.

WHAT IS GENDER? WHAT IS SEX?

*A QUIZ ON SEX AND GENDER**

Which is which?

1. *Women can breastfeed babies.*
2. *Women stay at home and do weaving; men handle family business.*
3. *Men can bottle-feed babies.*
4. *Women undergo menopause; men do not.*
5. *Women cook and men build houses.*
6. *Women have better instincts for parenting than men.*
7. *Men inherit property; women do not.*
8. *Women give birth to babies; men do not.*
9. *Women earn 10 percent of the world's income because they do less work than men.*
10. *Men are strong, women are gentle*

ANSWERS:

1. Sex. Biological.

2. Gender. The answer conforms to gender stereotypes in some cultures. But, it is culturally determined. For example, in ancient Egypt, men stayed home and did weaving; women handled family business.

3. Gender. Either sex can bottle-feed; it depends upon the culture as to which sex does this task.

4. Sex. This statement refers to sex, but some studies have shown that men undergo a form of menopause; it depends upon the definition of menopause.

5. Gender. Women build houses or construct roads in some cultures. In a study of 224 cultures, there were five in which men did all the cooking, and 36 in which women did all the house building. But, another aspect of gender is this question: Why are women often expected to do the cooking at home, but most chefs in paid positions in restaurants are men?

6. Gender/Sex? This answer is controversial. Some believe that women are wired differently because they give birth and may bond more closely with children for this reason; others believe that this is just the stereotype that reinforces the bonding and, consequently, discriminates against men, especially in child custody cases.

7. Gender. There have been cultures where the reverse is true.

8. Sex. The biological answer is clear.

9. Gender. This answer is clear but the reason may be gender blindness in collection of statistics; women's work is usually invisible in the GNP. According to UN statistics, women do 67 percent of the world's work, but their earnings amount to only 10 percent of the world's income.

10. Sex/Gender? This answer can generate some controversy. It depends on how we define tough. Some women and some men are gentle. Some women and some men are "strong." Most men may have stronger muscles, but why do women live longer? Why are mortality figures higher for boy babies? Why do we call men "gentlemen"?

*Adapted from the Oxfam Gender Training Manual.

WHAT IS GENDER? WHAT IS SEX?

GENDER DEFINITIONS

*It is far more important to remember what to DO about gender
than to memorize a list of definitions. Academicians are still discussing and disagreeing about some of
these terms. However, here are some frequently used terms:*

Gender: Sometimes the word gender is used interchangeably with sex, especially in the media. The most important thing to remember is that gender roles and stereotypes can guide or confine our options or opportunities as females and males throughout our lives. Stereotypes about gender roles can also affect issues around sexual identity.

Gender Equity →Gender Equality

Gender Equity is usually described as a process or a strategy of being fair that **leads to Gender Equality**. Like racial equity, it may suggest the need to take measures to compensate for historical and social disadvantages that prevent certain groups from operating on a level playing field. Gender equity strategies are used to gain gender equality.

Gender Equity is the means.
Gender Equality is the result.

Gender Integration usually refers to incorporating gender factors in discrete parts of programs.

Gender Mainstreaming is more holistic, implying an entirely new way of doing business for an organization. In other words, an organization mainstreams a gender perspective from the top to the bottom-- from the director's communication to personnel policies to partner agreements and project activities on the ground. Gender mainstreaming occurs when objectives, programs, practices, attitudes, and organizational culture are transformed.

But, if you confuse them, you will not be alone.

WHY DO WE CARE ABOUT GENDER IN DEVELOPMENT?

Some Examples:

Health-HIV/AIDS: Women and girls comprise up to 60% of the new cases of HIV/AIDS in Africa. If we don't ask why, projects that ignore gender factors will not advance solutions to the pandemic. Females -- single or married -- often have little control over decision-making about sex or sexual protection.

Health – Primary Healthcare: After disaggregating (separating) statistics, researchers learned that men use preventive health services far less often and appear only when an illness has progressed and more costly services are needed. The difference between the sexes suggests that we need to ask more questions. Why don't men use existing clinics at an early stage of an illness? The answers will guide health planning and how we design projects.

Economic and Business Policy: In economic planning, gender factors are important in how men and women have access to and own resources. For example, policies that standardize collateral in business loans can vary in their impact. Men may have title to cars or property, which are usually counted as collateral, but women may have non-traditional forms of collateral such as jewelry or household appliances.

Agriculture: Women produce up to 70 percent of the domestically consumed food in Africa, while men raise mostly cash crops. If you look at food security, you have to ask why this is true and how taking gender into consideration can affect agricultural research, extension services, economic productivity, agricultural yield, and food security.

Education: Sex-disaggregated enrollment statistics are important, but they do not tell the whole story. If addressing enrollment and graduation issues, we need to know the gender factors and roles that cause each sex to be absent or drop out. For example, gender roles may require boys to help harvest crops; girls may leave school early some days because of lack of toilet privacy or if they are having their periods.

Forestry: Land use regulations can drastically affect women if their gender role is to collect firewood. If forestry regulations change land use, these women may have to travel much farther distances, which affects their time and energy for agricultural production, which in turn can affect economic conditions for the entire household. A project may have negative effects if the sex most affected by land use changes are not consulted in the planning,

Disaster Assistance: When dealing with the tsunami disaster, sex disaggregated statistics were important in determining what kinds of aid were necessary among the survivors. Most victims were female, yet sanitary supplies and underwear were often overlooked in some shipments of aid.

ARE THERE OFFICIAL REASONS WHY WE NEED TO CARE?

Many governments have signed international and regional agreements that include references to gender equality. The best-known agreements are:

CEDAW UN Convention on the Elimination of Discrimination Against Women, 1981

Platform for Action, Beijing, UN Conference on Women, 1995

Declaration on Gender Equality in Africa (ECA)

In addition, USAID requires a number of points at which gender considerations must be integrated and articulated in documents through the ADS (Automated Directives System). Analytical work in the planning and development of USAID Strategic Objectives and Intermediate Results must address at least two questions:

ADS Requirement

(1) How will gender considerations affect the achievement of sustainable results?

(Gender as a variable)

(2) How will proposed results of a project affect the relative status of men and women?

(Gender as an equity issue)

Addressing these questions involves taking into account not only the different roles of men and women, but also the relationship and balance between them and the institutional structures that support inequality between the sexes. Such institutionalized inequality can affect both men and women.

--and, consequently, the success of development projects.

CAN STATISTICS OVERLOOK HIDDEN GENDER FACTORS?

The UN estimates that 67% of the world's work is done by women,
but women receive 10% of the world's income.

Women are invisible in labor statistics for two reasons:

- Many women work in the informal sector, selling goods and providing community services – work that is not captured in the GNP (Gross National Product) of most countries.
- Much of women's "work" in the household would have a value if the family had to hire someone to perform the service. Without this "work," economies could not function.

Men are also invisible in some cases:

- Many programs count and talk about female-headed households. But, men who are raising their children alone are rarely counted or targeted in development projects. Sometimes health projects, especially concerning reproductive health, may overlook the roles or needs of men.
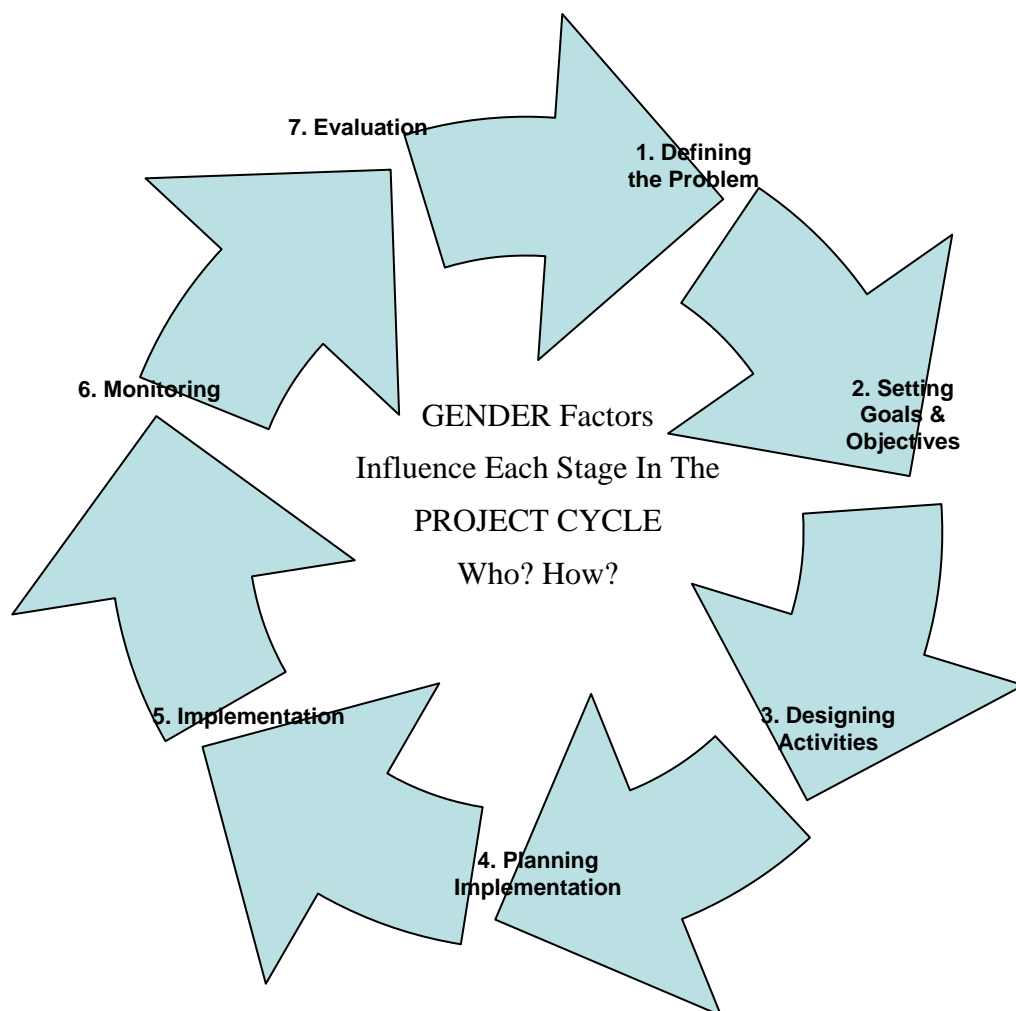
In other examples:

Statistics on HIV/AIDS can overlook data on where the caretaking is taking place, who is carrying out the tasks, and the impact on the entire household. If women fulfill these caretaking tasks as men return to the rural areas with the illness, the women have less time for raising food for the family which can lead to malnutrition and neglected health for all members.

In field research, rural women can be overlooked because (1) field researchers may be mostly men who by conservative custom cannot talk alone with the women, (2) rural men often speak for women when both sexes are present with a researcher, and (3) researchers may miss women when they come at certain times of day when women are off gathering fuel or water. The definition of "head of household" can vary from culture to culture that affects which sex is interviewed.

When the researcher asked: Who works in this household? Both the woman and the man answered: The man "works" (with his paid job).

Yet, when villagers did an exercise of putting stones in two piles to illustrate the "work" that each sex does from morning to nightfall, both sexes were amazed at how many more stones represented the chores done by women.

WHY IS GENDER IMPORTANT IN USAID'S PROJECT CYCLE?

7. Evaluation

1. Defining
the Problem

6. Monitoring

GENDER Factors

Influence Each Stage In The

PROJECT CYCLE

Who? How?

2. Setting
Goals &
Objectives

3. Designing
Activities

5. Implementation

4. Planning
Implementation

Examples:

➢ *Problem or Strategy: Women or men may see a problem from an entirely different perspective, according to their own needs, experience, and responsibilities. The way the problem is identified dictates the range of solutions.*

➢ *Monitoring: Which sex is doing the monitoring in the field can affect the data that is collected. Hidden factors about gender roles can emerge that could suggest a mid-course correction to meet project objectives..*

To help remember the right questions to ask when looking at the project cycle,
use the following CRIB* Sheet.

*A piece of paper with short answers that students use to prepare for an exam.

LEARNING TO ASK THE RIGHT QUESTIONS

**Examples of Gender Questions
That Can Affect Project Success or Failure**

The CRIB Sheet

Cultural Roles & Practices

How do cultural expectations influence the resources, involvement, and benefits of women and men involved in and affected by the project?
How do they restrict each sex or provide opportunities?
How do they affect the design, implementation, and results of the project?
Who is consulted? Who decides what? Who does what? Who controls what?
Who has access (or needs permission to access)?

Rights & Resources (Money, Credit, Training, Information, Transportation, Time)

Who has legal rights? Customary rights? Which rights provide or restrict opportunities?
Which resources are involved? Who has access to them? Who controls them?
Who decides how money is spent?
How does access to transportation affect the project?
How does time as a resource affect the project?
Are project resources connected with the appropriate people who do the work?

Involvement

Who is involved in defining the problem? Who talks to researchers?
Who is involved in conducting research? Who is asking the questions of which sex?
Who designs the data collection process? Who decides which data is collected and how it is organized?
In project activities, who is involved in leadership? In decision-making? In project activities, including staff meetings? Is involvement active or passive? Who participates in information flow and control?
Who is involved in designing the project? Implementing the program? Monitoring the program?
Who is involved in designing and participating in the evaluation?

Benefits & Power

Who benefits directly from the project? Who benefits indirectly?
Who benefits from the way the problem is defined? From the way the project is carried out?
Who benefits short-term? Long-term?
What happens to the relative status and power relationships between women and men?

DOES YOUR PROJECT HELP OR HURT GENDER EQUALITY?

Gender factors can affect the success or failure of projects. However, the intended and unintended results of projects also can affect the status or relative power relationships between the sexes. Some projects provide opportunities to meet project objectives, while transforming gender relations for both women and men.

Is your project or the way it is being carried out improving gender equality? Helping only one sex? Doing any harm? Making the gender inequality worse? How will the results affect the status or relative power relationships between the sexes? Can you meet project objectives while transforming gender inequalities?

Three categories help us think about how project results affect gender equality:

Improves Gender Equality: These projects actually change the underlying cultural status or power relationships between the sexes-- directly attacking the underlying gender inequality.

Example: A development organization was distributing animals to community members. After a "gender audit," they decided to directly address cultural traditions that would not allow women to own certain types of animals or to inherit them after their husbands died. Formerly, women and their children were often left destitute when husbands died. The organization changed the terms of formal agreements with individuals in the community, making it possible for women to own and inherit previously-forbidden animals that increased the household income, food security, and improved family nutrition.

Accommodates the Status Quo, While Helping One Sex: Sometimes gender inequality in the culture is so deeply established that a project can only minimize some gender inequalities, not fully change them. In this case, we try to do no harm. We help women or men without changing the unequal status or the confining stereotypical roles.

Example: Tourism projects affect women and men differently. A tourism project may teach handicraft skills to women, thus locking them into traditional lower-paid jobs without providing options for more lucrative work typically done by the males. Such a project can help the women learn new skills, slightly increase their incomes, but still not produce enough income to lift them out of poverty. Thus, the project slightly improves their lives, while merely accommodating the underlying unequal status quo.

Worsens Gender Inequality: These projects - either in their design or implementation or results - actually make gender inequalities worse. Sometimes it may not be apparent on the surface. That's why asking the right questions and digging below the surface is important.

Example: An HIV/AIDS project focused only on giving out condoms to women and telling them to convince their husbands to use condoms. However, women often have no control over their sexuality within marriage and, in some cultures, men do not want to wear condoms at home. This type of project failed to consider a major gender factor of cultural practice.   Asking women to insist on the husband changing this practice resulted in distrust between the sexes and even increased domestic violence. Unless gender roles and power relationships are taken into consideration, a project like this can backfire and make the situation worse.

And That Is Why Gender Matters.