



The Gender Audit Handbook

A Tool for Organizational Self Assessment and
Transformation

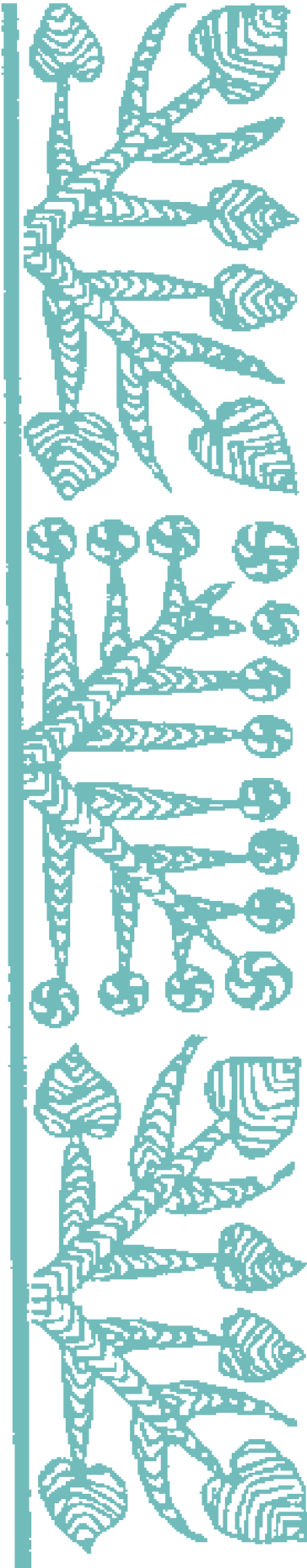
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The Gender Audit Handbook

Step 1 – Preparing for the Gender Audit

Step 2 – Staff Survey

Step 3 – Focus Group Conversations

Step 4 – Gender Action Planning

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InterAction encourages the use, translation, adaptation, and copying of this handbook. We do, however, ask that you acknowledge and cite all materials used.

Acknowledgements

This document is intended to serve as a resource for achieving organizational gender equality. The work of creating this handbook began in the mid-1990s through the efforts of Patricia Morris and Suzanne Kindervatter at InterAction. They developed the concepts and theory of organizational transformation presented in the current document. They laid out the step-by-step process that makes up the Gender Audit, including assessing organizational readiness, surveying staff to understand perceptions of gender integration, using focus group conversations to explore what a gender-sensitive organization would look like, creating a detailed action plan for integrating gender, and finally, monitoring on-going activities that achieve gender equality in the organization.

Julie Montgomery, also at InterAction, created the first layout design, which is still used in the current document. Other individuals have assisted with editing, content, layout, and design. Thanks to Amy Woods, Julie Olsen, and Danielle Roth. Building on the original Questionnaire Handbook, Jeannie Harvey designed the current document which now includes all steps of the Gender Audit Process in one place.

InterAction

InterAction is the largest coalition of 200 U.S.-based international nongovernmental organizations (NGOs) focused on the world's poor and most vulnerable people.

InterAction recognizes that global challenges are interconnected and that we can't tackle any of them without addressing all of them. Thus, InterAction created a forum for leading NGOs, global thought leaders and policymakers to address challenges collectively. By leveraging shared expertise and on-the-ground insights from InterAction's 200 member organizations, and by conducting strategic analyses of foreign aid, development and humanitarian practices, InterAction delivers a bold, new agenda to end global poverty and to deliver effective aid in every developing country.

InterAction's commitment to gender equality

Gender equality and women's empowerment have long been goals of InterAction. A strong working group on Women in Development, active since before 1990, was transformed in 1992 by InterAction's board into the Commission on the Advancement of Women, or CAW. Since then, CAW has produced many publications, including *Revealing the Power of Gender Mainstreaming: Enhancing Development Effectiveness of Non-Governmental Organizations in Africa* (James-Sebro 2005) and has produced all materials related to the Gender Audit process. In 1996, the InterAction Board of Directors adopted Gender Equality Amendments which became part of the PVO Standards by which InterAction member organizations agree to abide. These Gender Equity Amendments recognize that organizational gender equality requires leadership, capacity, accountability, and a gender-sensitive culture. Examples include possessing a strong gender policy, offering staff training in gender analysis, ensuring gender analysis and data disaggregation of all projects and programs, integrating gender-sensitivity into human resources processes such as gender-sensitive job recruitment and including gender in job descriptions, instituting family friendly policies, and supporting equal pay for equal work.

InterAction understands that gender equality is a process, thus we are still engaged in advancing this important work with member organizations and in foreign policy. We offer technical assistance for gender integration, gender audit trainings, speakers on gender-related topics, and resources on best practices in gender integration. We promote gender inclusion in foreign assistance and in aid reform efforts. InterAction promotes integration of gender considerations throughout our working groups and in other InterAction activities. Further, InterAction hosts several working groups related specifically to exploring aspects of gender and development or humanitarian practice. Current gender-related groups staffed and supported by InterAction include the following:

- Gender-Based Violence Sub-Working Group (GBV-SWG)
- Gender Integration Working Group (GIWG)
- Gendering of Foreign Assistance Reform Task Force (GOFAR)
- Sexual Abuse and Exploitation Sub-Working Group (SEA SWG)
- Women, Faith, and Development Alliance (WFDA)

For more information about these groups, other activities at InterAction, or the Gender Audit process go to www.interaction.org or contact gender@interaction.org.

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Using this Handbook

Welcome to the InterAction Gender Audit Handbook. This guide is intended to help you conduct a gender audit-organizational transformation process in your organization. As facilitator, you and your team will carry out several activities to advance gender equality and create a strong gender action plan in your organization. These steps, plus the necessary material, are outlined and contained in this handbook.

Objectives

The objectives of this handbook are to:

- Introduce you and guide you through each step of the audit process.
- Provide you with the tools, resources, and information you need to conduct each step of the gender audit.

Audience

This handbook is intended to be a resource for individuals and teams who will lead a gender audit process in their organizations. Facilitators might be gender officers, gender focal points, members of gender teams, or consultants working with an organization to conduct a gender audit process. You do not need to be a gender expert to use this handbook. Some knowledge of key gender principles and terms is needed, and you will need time and some resources to carry out the gender audit.

Staff of indigenous and international NGOs, government, UN, and other agencies will find the handbook useful for gender audits of headquarters and regional or local offices and programs. Any agency that seeks to learn how to make gender more visible in the organization or to learn how staff feel about gender equality in the organization would benefit from using this handbook and conducting a gender audit. Students of gender in international development may also find the handbook useful in their studies, even if you don't plan to conduct a gender audit.

Tips for Audit Facilitators

The role of the gender audit facilitator is to develop an atmosphere of trust and encouragement so that staff feel their voices are valued, heard, understood, and that they will be held in confidence. The audit process is one of internal reflection and, at times, can unearth uncomfortable thoughts and ideas. The facilitators can help create an environment where staff feel they can be honest and open by ensuring that regular communication shows clear goals and processes for each step of the audit process. Further, all sessions with staff should ensure their confidentiality while also being interesting, interactive, and engaging. The intent is to allow your team to hear multiple opinions, to ensure that dominant personalities do not overpower and quieter personalities feel empowered to speak.

Be sure to devote adequate time to conducting the gender audit process, making sure that you and your team have enough time to carry out each step of the audit. Start by familiarizing yourselves with this handbook and each step of the audit. Learn more if you don't feel comfortable with a particular area (e.g., holding focus groups, survey methodology), or enlist help from others in your organization. For example, for help to create the gender newsletter you might ask for help from your communications or computer (IT) staff. Or, for data analysis you might seek help from your M&E unit or a university statistics department. It is good to include as many staff as possible in the process of helping you. This creates more ownership of the process plus you learn together about gender integration and gender equity in your organization.

InterAction Gender Audit Overview



Development can only have a beneficial outcome for women when the working culture, structure, systems and procedures, and underlying values of the institutions which shape women's lives themselves reflect a concern for gender equality.

Fenella Porter, Ines Smyth and Caroline Sweetman

Rationale

Those who work on gender in development and humanitarian assistance organizations are becoming more aware of the role that organizational structure and organizational culture play in the design and delivery of gender-sensitive programs and projects. The fact that women and men have different access to and control over resources is well known. Women and men benefit in different ways from development projects and humanitarian relief efforts. How projects are designed is inextricably linked to the gendered nature of the organization providing the assistance. As Caroline Sweetman argues, "Working on gender issues obliges organizations to set their own houses in order, and change aspects of the organizational culture which discriminate against women staff and women 'beneficiaries'" (Sweetman 1997, p. 2)

A fundamental premise underlying InterAction's support for the gender equality initiatives of InterAction member organizations is that gender equality must be integrated into an organization's programming and organizational practices in order to bring about sustainable change toward achieving real equality. Thus, InterAction's Gender Audit process is designed to capture both the programming and organizational characteristics and to serve as a useful tool which can be used by any organization, regardless of its current level of gender integration.

Purpose of this handbook

The *Gender Audit* is a self-assessment tool for identifying staff perceptions regarding how gender issues are addressed in programming and in internal organizational systems and activities. It is also a process for creating ongoing gender action planning, and to identify challenges and opportunities for increasing gender skills and organizational equality. The *Audit* is organized into four steps:

1. Preparing your organization to carry out a *Gender Audit*.
2. Surveying staff to uncover their perceptions regarding gender equality in the organization and programs.
3. Conducting focus groups to develop an organizational vision of gender equality; and
4. Creating your organization's Gender Action Plan.

The entire process is designed to garner information on the status of gender equality in organizations vis à vis InterAction's *Gender Equity Amendments* in the *PVO Standards*, which are InterAction's ethical and operational principles. All InterAction member organizations certify compliance with these standards. The standards encompass organizational governance, management, personnel and programs. See Sidebar, this page.

Outputs

The *Gender Audit* provides organizations with a tool and approach to assess their compliance with the *Gender Equity Amendments* and to develop an action planning process for moving forward. The *Audit* provides organizations with three useful outputs:

- (1) A reflection of the status of gender equality within the organization.
- (2) A baseline for collective discussion and analysis.
- (3) A participatory process that builds organizational ownership for the agency's gender equality initiatives and ongoing gender action planning.

The *Audit* enables organizations to identify the impact of gender relations on their agency's culture, processes, programs and organizational performance and vice versa. When the specific patterns of gender relations in an organization are uncovered, it becomes possible to work within the organization to change the unequal patterns and to reinforce the equalizing ones, making the organization more gender responsive.

InterAction Gender Equity Amendments PVO Standards

- ☑ Develop a **written policy** that affirms a commitment to gender equality in organizational structures and in staff and board composition.
- ☑ **Train program staff** in gender analysis for program planning, implementation and evaluation.
- ☑ Institute **gender analysis and planning** in all phases of the program process, in collaboration with local NGO partners.
- ☑ Integrate gender sensitivity into **human resource development** for staff at all levels to improve organizational effectiveness, promote nondiscriminatory relationships and respect for diversity in work and management styles.
- ☑ Include gender awareness in **job performance criteria**.
- ☑ Strive to increase the number of women in **senior decision-making positions** and on Boards of Directors.
- ☑ Institute **family friendly policies** and create an environment that enables both women and men to balance work and family life.
- ☑ Develop policies and practices that support **equal pay for equal work**.
- ☑ Establish a mechanism, consistent with the organization's mission and constituency, which operates with a **mandate from the CEO** to promote and monitor the integration of gender equality in programs.

Making Organizations Gender Responsive

Gender Integration Framework

The audit process uses a framework and theory of change called the Gender Integration Framework (GIF), which suggests that transformation can only occur when four organizational dimensions are ready for gender integration. These four elements are political will, technical capacity, accountability, and organizational culture, and they can be viewed as akin to a tree (Fig 1). Political will constitutes the roots of the tree and is essential to promote and make organizational change possible. The other three elements comprise the branches of the tree and are also required in equal measure to successfully integrate gender. The components of the Gender Integration Framework are examined and assessed during each step of the gender audit process. InterAction's experiences with NGO member organizations consistently highlight the significance of these four elements in transforming *gender-blind* organizations into *gender-responsive* ones:

Political Will - Ways in which leaders use their position of power to communicate and demonstrate their support, leadership, enthusiasm for and commitment to working toward gender equality in the organization.

Technical Capacity - Level of ability, qualifications and skills individuals in an organization need to carry out the practical aspects of gender integration for enhanced program quality, and level of institutionalization of gender equitable organizational processes.

Accountability - Mechanisms by which an organization determines the extent to which it is "walking the talk" in terms of integrating gender equality in its programs and organizational structures.

Organizational Culture - Norms, customs, beliefs and codes of behavior in an organization that support or undermine gender equality - how people relate; what are seen as acceptable ideas; how people are "expected to behave" and what behaviors are rewarded.

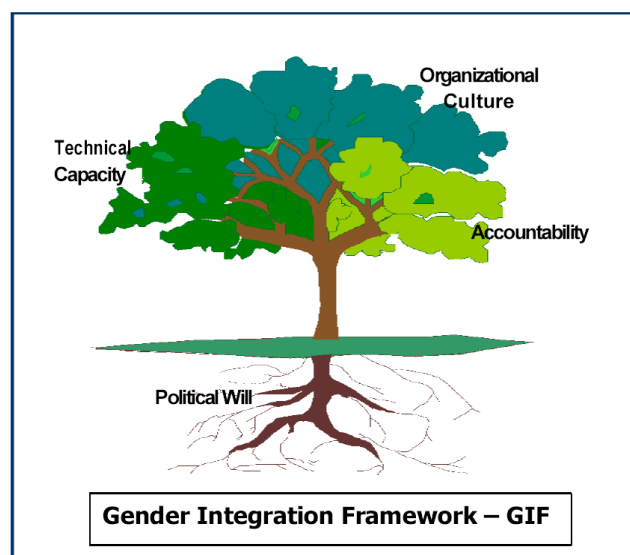


Figure 1: The CAW's Gender Integration Framework

Framework developed by the Commission on the Advancement of Women. Copyright 1999. For more information, contact: InterAction - CAW, 1400 16th St, NW, Suite 201, Washington, DC 20036, Tel: 202.667.8227, Fax: 202.667.8236, Web: www.interaction.org

Vision

Integrating gender into an organization's activities and structures has dimensions that are both external and internal to the organization itself. Externally, gender integration fosters the inclusion of and benefits to women and men who participate in or who are affected by an organization's projects, services, or initiatives. Internally, gender integration promotes women's leadership and equality within the organization's policies and structures and provides benefits for both women and men in the process.

A Gender Audit Story - World Vision

World Vision US first conducted a gender audit in 2004-2005. In 2010, World Vision US is again conducting a gender audit, or, Gender Self Assessment, as they call it, across its US offices. A Christian relief, development and advocacy organization, World Vision is dedicated to working with children, families and communities to overcome poverty and injustice in nearly 100 countries around the world. After exploring several gender assessment tools in 2004, World Vision staff chose InterAction's *Gender Audit* tool because it focused on the entire organization and provided a structured space for the organization to learn about and improve its gender mainstreaming efforts.

From those first audit results, World Vision US was able to learn and take steps to strengthen gender equity in programs and organizational processes. Examples of actions they took include: a) creating a gender specialist position within their International Programs Group, b) developing a position statement on gender, c) providing gender training programs for staff, d) developing guidelines for gender integration for program design, monitoring and evaluation; e) including gender as a mandatory cross-cutting theme in program design, and f) creating new family-friendly policies.

Since 2004, 23 of World Vision's national offices across the developing world have taken up the initiative and more than 500 staff have participated. The audit process in India, for instance has helped World Vision to identify and build on its successes, while it also helped World Vision deal with challenges, such as how to recruit more female staff in rural project sites and how to overcome female stereotypes. In addition, World Vision India's Gender Advisor position has now become a permanent Director level position in the country office.

World Vision US Senior Vice President, George Ward, asked, "How do organizations move from addressing gender or create women's programs that go beyond simply adding a paragraph or an indicator to the program description?" He continues, "For many organizations, the challenge is how to achieve a full understanding of evidence-based programming that addresses gender on every level. The *Gender Audit* is useful because it allows for a reflection on the status of gender equity within the organization, serves as a baseline for organizational decisions regarding gender equity, and uses a participatory process that builds organizational ownership for gender equity."

In 2005, InterAction conducted a study of member organizations in Africa¹ and found that projects which promoted gender mainstreaming, women’s empowerment, or girls programming brought hoped-for gains for girls and women while also bringing surprising and unintended benefits for men and boys including a reduction in the age of marriage, increase in fathers’ support of girls’ education, and reduction of violence against women and girls. Organizations made several key changes after conducting gender audits:

- they linked gender equity to poverty alleviation;
- their top leadership demonstrated strong political will to institutionalize gender throughout organizational policies and procedures;
- they reviewed their projects for gender equality and changed their approaches in several ways to more directly target beneficiaries, to address participation of women and men in the project, and to reduce project structures that perpetuated inequalities or gender stereotypes; and
- they more directly addressed the needs and concerns of men by listening to them and involving them as partners with women.

“We decided we wanted to be the best on gender, and that change permeated the organization. It is a different consciousness. We are more intentional.” —Lutheran World Relief

“It’s a continuous process. It’s not a nine-day wonder, and with gender mainstreaming, both men and women are made conscious of their capacity to improve their quality of life through the development of their potential.” —Male staff member, development organization

“Development to us is the change of (agricultural) yield, because now we have more yield than before when we never used to have the groups. Since the training was formed, we know that there is no job of men and women. All jobs are equal. We can see development” —Male in Mashanga, Kenya

Results of Gender Mainstreaming in InterAction member organizations

- ☑ World Vision Ghana devoted 2% of its budget to ensure that gender was mainstreamed throughout its operations and instituted a 2-year moratorium on hiring of men until staffing could be brought to more equitable levels. World Vision also involved women and men together in income generation training for palm oil processing, which decreased male resentment over women’s growing economic independence.
- ☑ Heifer Project International, Zambia, overturned legal precedents and entrenched cultural traditions through revisions of its project policies and contracts. For example, Heifer Zambia gave animals to women that previously has been taboo for their sex; trained the women in new areas of animal care, which increased nutrition and food security in those communities, and, through project contracts, enabled women to jointly own the animals and inherit them if their husbands died. They expanded animal technical training to include both sexes, which also increased male support for gender-mainstreamed projects because they could see tangible, economic benefits to gender equality.
- ☑ CARE Niger set up a number of gender task forces and mechanisms, and opened management meetings to more staff, which increased frank discussion of broader ethnic and diversity issues. At the project level, CARE Niger enlisted the support of women elders and religious leaders. Staff was made aware of policies and practices affecting women, including field assignments, motorbike allotment, and job transfers for female-headed households.

¹ James-Sebro, Meryl. 2005. *Revealing the Power of Gender Mainstreaming: Enhancing Development Effectiveness of Non-governmental Organizations in Africa*. InterAction, Commission on the Advancement of Women. www.interaction.org.

Community Level Benefits

In all sixteen communities that were studied, strikingly positive outcomes were experienced after the organizations implemented gender mainstreaming approaches. The study revealed a multitude of economic and social benefits for household and communities, including greater agricultural yield, improved sanitation, improved health and nutrition, and expanded primary school enrollment, especially for girls.

Men moved from initial resistance of gender mainstreaming to active support. They also registered increased self-confidence from project activities. Widespread poverty and food insecurity also place men in positions of physical, emotional, and financial insecurity that leave them unable to take care of their familiars, feeling vulnerable and unsure of themselves. This insecurity results in low self-esteem among males, a fact that is often overlooked by gender and development experts, but frequently manifested in violence against women and children.

A recurring theme of the study was the way in which gender mainstreaming introduced new ideas and strategies for making the connection between women's oppression and poverty. Traditional beliefs and practices represented the glue that held together the institutionalization of women's oppression. Gender mainstreaming, as illustrated in the communities studied, holds the power to bring women and men together to battle the forces that keep them separate, hungry and poor.



InterAction Gender Audit Process

The InterAction *Gender Audit* is a self-assessment tool that allows you to collect information from organization staff to assess the status of gender equality in development and humanitarian assistance agencies. The goal of the audit process is to create a Gender Action Plan using information you have gathered that identifies organizational strengths and areas that need strengthening. The aim of the audit is to develop a plan that helps your organization to achieve gender integration and to improve gender equality within organizational processes, programs and activities. The Gender Action Plan, which is agreed to by organizational leaders, is intended to be the starting place for continued and ongoing improvement and assessment. This handbook details the audit's steps with instructions for conducting each step. This section and the sidebar provide a brief description of each step.

The *Gender Audit* process is intended to be conducted in both a systematic and participatory manner, and should include as many staff as possible. Voices that represent all levels and types of positions within the organization should be represented. Results from each of the audit steps will increase and build organizational understanding, ownership, and readiness to act on a shared agency-wide gender equality initiative.

You should begin by convening a Gender Team comprised of representatives from all levels and divisions in the organization that can develop a plan for conducting the gender audit throughout the organization and that is able to lead the organization through each step of the gender audit process.

Depending on the size of the organization, the audit may take one of three shapes. For small organizations with less than 50 staff, you should involve all staff in the survey and focus groups. For medium size organizations of 50 to 300 staff you can select a sample of participants who come from all teams within the organization. For large organizations of over 300 staff and multiple units you may wish to conduct the audit in individual offices (e.g., headquarters, selected country field office or offices, regional field office or offices, etc.).

Gender Audit Steps

- ☑ **Step 1: Preparing for the Audit**
 - Assessing your organization's readiness
 - Gaining management buy-in
 - Developing a communications strategy
- ☑ **Step 2: Understanding Gender in your organization**
 - Conducting the staff survey
 - Presenting the results
- ☑ **Step 3: Digging Deeper**
 - Conducting in-depth focus group conversations
 - Presenting the results
- ☑ **Step 4: Moving Forward: Gender Action Planning**
 - Creating the Gender Action Plan
 - Communicating results and next steps
- ☑ **Follow-up**
 - Ensuring continued follow up on your Gender Action Plan

Step 1 – Preparing for a Gender Audit

Establish Organizational Readiness

The first step of the *Gender Audit* process is to assess your organization’s readiness to conduct a gender audit. After you determine that your organization is ready, there are several things you need to do to prepare the organization for a gender audit. First, you need to gain support from senior leadership; they are your “cheerleaders” for successfully carrying out the entire process. Second, you need to communicate to organization staff what the gender audit is about and what steps are involved, including the benefits to the organization and timeline. Third, you need to develop a plan for communicating each step of the audit process to organization staff, again, describing the value of conducting the gender audit process and the gains that will be made in your organization as a result.

Step 2 – Staff Survey

Create a Gender Audit Questionnaire to meet your needs

The second step of the *Gender Audit* process is to conduct a survey of staff using the *Gender Audit* questionnaire. The questionnaire was designed to help organizations assess the range of understanding, attitudes, perceptions and reported behavior among staff in their own organization. Responses to the questionnaire serve as a baseline of **staff perceptions** on the status of gender equality in the organization's programs and processes. There are two survey instruments you can choose from: a **long version** or a **short version**. The longer questionnaire seeks to discover what staff think the organization is doing on the two dimensions of organizational functioning: 1) programming, or, what you do primarily in the field; and, 2) operations, or what you do inside the organization. See side bar for list of indicators for each of these dimensions.

The shorter questionnaire template is 22-questions which you can design to fit your organizational needs. This shorter version yields results that can be analyzed using the four dimensions of the Gender Integration Framework: Political Will, Technical Capacity, Organizational Culture, and Accountability. Instructions are provided for each questionnaire process including details for sampling, data analysis, and reporting results. Whichever version you use, survey results are communicated to staff in two ways: 1) through a gender newsletter and, 2) through a PowerPoint presentation to staff. Templates for the newsletter and PowerPoint presentation are provided which you can adapt to the needs of your organization.

Organizational Dimensions

- Programming**
 - Program Planning & Design
 - Program Implementation
 - Technical Expertise
 - Monitoring & Evaluation
 - Partner Organizations
- Operations**
 - Gender Policies
 - Staffing
 - Human Resources
 - Advocacy, Public Relations, & Communications
 - Financial Resources
 - Organizational Culture

Step 3 – Focus Group Conversations

Conduct Focus Groups

The third step of the *Gender Audit* process is the discussion and analysis phase. This is the point where a focused review by staff of the results of the questionnaire takes place. These conversations provide the basis for identifying actions that need to be taken to promote gender equality. Each focus group conversation begins with a short presentation of the survey results along with key guiding questions you want the group to explore. The goal of the focus group conversations is to gain deeper insights into the survey findings and to learn more about trends in the data. This handbook gives detailed descriptions of the focus group process, including participant selection, questions to ask each group. A video guide for conducting focus groups (with facilitation tips) can be obtained by contacting InterAction at gender@interaction.org.

Step 4 – Gender Action Plan

Compile a Gender Plan of Action

The primary output of the *Gender Audit* is a detailed Gender Action Plan that builds on the organizational strengths you have identified through the survey and focus group conversations. The data you have gathered will identify challenges faced by the organization, and focus group conversations yield suggestions and detailed ways the organization could move forward to achieve greater gender equality. These data, suggestions, and ideas form the basis of the Gender Action Plan, which you develop in a planning session with your Gender Team (and others as suggested). Specific activities you will include in the Gender Action Plan are initiatives, strategies, and processes that will help your organization to integrate gender. The desired outcome of the *Gender Audit* process is shared ownership to move toward a gender-friendly organization and the Gender Action Plan is used to include these ideas and suggestions from staff. A template and samples are provided for you to use.

Follow-up

Ongoing Gender Integration

One key aspect of the *Gender Audit* process is ensuring that recommendations in the Gender Action Plan actually happen and, over time, gender equality in the organization is increased or maintained. The recommended activities, benchmarks, and targets in the Gender Action Plan need to be monitored and assessed for completion and/or renegotiation. To ensure follow-up, a Gender Team or Gender Focal Point should create a mechanism for annual assessment of the Gender Action Plan or an annual progress report or score card to assess progress toward reaching your Gender Action Plan goals and targets. Creating and agreeing on specific and implicit commitment mechanisms to monitor the Gender Action Plan will go a long way to ensuring that the Gender Audit process receives on-going support and real gender equality is achieved.

Gender Audit Timeline

This timeline is provided to help you plan ahead and think through each step of the *Gender Audit* process. Organizations take from 3 months to a year to conduct the audit. We suggest you create a timeline planning document which becomes your guide for each step of the process. Keep in mind that conducting an assessment process such as this nearly always encounters unexpected obstacles and/or delays along the way. This is inevitable. Don't get discouraged. You and your team need to stay focused and shift your timeline as needed to meet challenges you experience. The following timeline is intended to give you an estimate of how long each step of the process might take. These are estimates and will vary depending on your organizational circumstances. Do your best to forecast how long each step will take. If possible, try to keep to your estimated completion date. You might build the completion date out a little further than expected. Then, ending on time will make a positive impression on senior leaders as well as staff.

Before the Audit – one month

- Create a Gender Team to conduct the audit: this can be an existing gender team or it might be a new coordinating structure set up to carry out the audit. Regardless, it should have representation from all departments and levels of the organization as well as gender and other diversity.
- Gender Team members should become familiar with the *Gender Audit* process.

Beginning the Audit – up to one month

- At the beginning of the audit process, you should plan to develop a strong timeline and projected dates for each stage of the gender audit process.

Conducting the Audit – 2 to 6 months

- The audit process can take between two and six months to complete. Each step of the audit requires planning and logistical details that can and often do, meet with unexpected roadblocks. Gaining senior level support can take several meetings, conducting the survey takes several weeks from start to finish, data analysis is time consuming, and setting up and conducting focus group conversations also takes several weeks.

Ending the Audit – one week

- To complete the audit, you will unveil the Gender Action Plan widely within the organization. To senior leadership, you communicate the activities and recommendations contained in the Gender Action Plan, and to all staff you will communicate how gender integration will unfold in the organization.

After the Audit – on-going

- The ultimate aim of the audit process is for your organization to create a mechanism that supports on-going gender integration, as well as provide you with a way to assess, at regular intervals, how your organization is doing to integrate gender. The Gender Action Plan is that mechanism, but it must be reviewed regularly and its timetable of activities updated and monitored for completion. The Gender Team may wish to add new activities as others are completed. Some organizations conduct a *Gender Audit* every 5 years as one way of assessing the Gender Action Plan elements and progress.



Step 1: Preparing for a Gender Audit

A comprehensive institutional assessment like a *Gender Audit* requires a well thought out strategy for communicating why you want to do the audit in the first place and what benefit it will be for the organization. First, you need to find out if your organization is ready to carry out this process, then you need a plan to communicate the rationale, purpose, and benefits for carrying out the gender audit and, finally, you need to let staff know what impact, if any, there will be on their day-to-day work.

The starting place for conducting a *Gender Audit* is to gain support from the senior management. Without support from the top, it is unlikely that the audit process would succeed. It is an organization's senior leaders who promote and urge participation by all staff in the audit process, and they ensure that there is organizational support for each step of the audit process including on-going follow up to the Gender Action Plan. Utilizing senior management to communicate the goal, intent and process of the gender audit will help to allay staff fears, resistance, and skepticism.

At least one individual in the organization should have the time and authority to oversee logistical and other details of coordinating each step of the audit process. This person can be a Gender Officer or the organization's Gender Focal Point. A Gender Team that represents a wide cross-section of the organization is also essential to promote and carry out all steps of the audit process. The Gender Team or Gender Officer must be empowered by senior management to carry out each step of the *Gender Audit* and continued follow up.

Preparing for a gender audit requires three things: 1) assessing organizational readiness, 2) gaining senior management buy-in, and 3) developing a communications strategy.

Assessing Organizational Readiness

An organization needs to be receptive to the idea of conducting a Gender Audit and must commit to carrying out each of the audit's steps. In order to know if your organization is ready, we have included a worksheet that you and your Gender Team can complete. The Organizational Readiness Worksheet (Appendix A) is intended to uncover your OPINION (not necessarily fact) and is meant to generate a conversation about your organization's readiness. This discussion can be the catalyst for issues to bring up with senior management or it can help you and your gender audit team explore how your organization can prepare to carry out a gender audit. To assess organizational readiness, we suggest the Gender Team along with interested staff, complete the organizational readiness worksheet and meet to discuss the results. You may take the following steps:

- Complete the Organizational Readiness worksheet and discuss responses (Appendix A)
- Learn about the Gender Audit process
- Prepare for and schedule a meeting with senior management to discuss the Gender Audit process

Assessing Organizational Readiness for a Gender Audit

- Support**
Are the top people able and willing to commit?
- Vision**
Does your organization have a vision of why gender mainstreaming is important and how it relates to improved program performance?
- Resources**
Do you have staff who are qualified and trained in gender analysis?
- History**
Does your organization have a history of willingness to change and improve?
- Politics**
Is gender mainstreaming seen as in the interests of your organization's leadership (board and executive leaders)?

Getting Senior Management Buy-In

The *Gender Audit* process requires commitment and staff time to carry out. Since the audit process also involves participation of staff at all levels of the organization, you need to ensure you have their full cooperation. You will be asking some or all staff to complete the survey, spend two hours in a focus group conversation, and provide feedback on the Gender Action Plan. To achieve this level of participation, senior managers must communicate their support for the process, they must promote and encourage staff to participate, and they must ensure credibility is given to the gender team that is conducting the audit.

There are several steps you should take with senior management prior to launching the audit process to gain such buy-in and to ensure you have their necessary support. The way you approach leaders in your organization will be dependent on your organizational structure and your relationship with senior managers. For some Gender Officers and Gender Teams, it will be relatively easy to discuss the audit process with senior leadership; while, in other organizations the Gender Team may not have easy access to senior leaders. You will need to work with your Gender Team to determine the best course of action in your organization.

Some suggestions for gaining leadership support include

- ☑ Ensure that your Gender Team fully understands the *Gender Audit* process before approaching senior management. This may mean walking through the entire audit process yourselves: taking the survey, practicing a focus group conversation, playing with data analysis and creating a Gender Action Plan so you fully understand each step and can honestly discuss the challenges and issues that might emerge.
- ☑ When you meet with senior management, try beginning with those managers you feel are most likely to support the audit. Start with your allies who can help you to unearth possible resistance, issues, and concerns. Then, your Gender Team can consider how best to proceed.
- ☑ After you understand the potential concerns and questions of your organization's leaders, prepare a brief presentation for senior management (see sample handout and PowerPoint, Appendix B). Although a PowerPoint is not necessary, your presentation of the audit process to senior leadership should make clear the benefits of conducting a gender audit to the organization.
- ☑ In some organizations, it may be useful to work through one individual who is supportive, discussing the audit process first with them, and then having them promote the audit to senior managers, while the Gender Team remains prepared to provide specifics and details.

When you have gained senior management buy-in, you are ready to proceed with your communications strategy, which should include specific references to actions that leaders in your organization have promised to take to remind staff of the audit process. It is also a good idea to urge their continued cooperation with the process.

Developing a Communications Strategy

You now need a way to communicate the audit process and benefits to all staff in the organization. Your strategy should include a timeline for conducting the audit and how you will communicate that timeline and goals of the audit process to staff. Staff should understand the products or outcomes of participating in the process.

For specific elements and components of a communications strategy, see sidebars (Communications Strategy Elements and Components). A Communications Strategy Worksheet can be found in Appendix B. The following are several suggestions for developing a strong communications strategy.

- Have senior managers relate the Gender Audit to your organization's gender equality goals.** The organization's senior managers should be the ones to announce the *Gender Audit* and what you are trying to accomplish by conducting it. They can refer to the organization's gender policy and other gender goals of the organization. They might say they want to create a needed baseline of gender perceptions in the agency that will inform the Gender Action Planning process. The audit can also be linked to a strategic planning process or goal.

- Convene a brainstorming meeting.** Representatives of your organization's leadership team, the Gender Team, and communications staff should hold an initial meeting to clarify tasks, roles, responsibilities, and intended timeline for conducting the gender audit.

- Place communications high on your priority list for the Gender Audit.** The communications strategy should cover all phases of the *Gender Audit* - beginning with an announcement of the initial launch of the *audit*, regular progress updates, and presentation of results at each stage of the audit process. Your strategy should conclude with communications that highlight final results, actions included in the Gender Action Plan, and planned follow-up activities.

- Commit to being proactive.** An internal communications strategy requires recognition of the need for such a strategy and commitment to following it. Staff in your organization need to understand why they are being asked to participate in the gender audit process. You can help by showing them the relationship between the work they do and the information sought during the *Gender Audit*. Creativity and energy go a long way in fashioning a successful internal communications strategy.

Communications Strategy Essential Elements

- Content**
What you need to tell staff about the gender audit

- Medium**
How you will tell staff about the gender audit

- Target Group**
Which staff you need to tell

- Messenger**
Who will tell it

- Timeline**
When you will tell it

Communications Strategy Key Components

- Gender Audit Announcements**
Which offices, countries, regions selected for the audit

- Updates on the audit process**
When, how, and who

- Notifications at each step of the audit**
 - Survey
 - Focus Groups
 - Gender Action Plan



Step 2: Understanding Gender in Your Organization – Surveying Staff

Step two of the *Gender Audit* consists of a survey of staff in the organization. Based on the elements of InterAction's *Gender Equity Amendments* and the *Gender Integration Framework*, the survey process seeks to discover the perceptions of staff in your organization regarding gender integration and gender equality. The key indicators of gender integration identified in InterAction's PVO standards form the basis of the questions posed in the questionnaire. Responses tell you what staff perceive to be the organization's progress toward these indicators. The questionnaire is intended to provide you with a snapshot of how staff feel about gender integration in the organization and its results provide you the basis for focus group conversations which will take place in Step 3 of the *Gender Audit* process.

This section includes a description of the survey content and questions for both the long and short questionnaires, instructions for conducting each survey, response analysis, and reporting the results.

Conducting the Survey

Conducting the *Gender Audit* survey will create a snapshot of the perceptions staff have regarding the status of gender equality in the organization. The questionnaire allows staff to take stock of what they believe is the current status of gender equality in your organization's work.

There are two questionnaire options: a long questionnaire containing 78-93 questions and a shorter questionnaire with 22-27 questions. The longer questionnaire provides considerable data to work with, which can be indexed according to two organizational dimensions: programming and operations. Both questionnaires can be analyzed using the Gender Integration Framework components (political will, accountability, technical capacity, and organizational culture). Either questionnaire yields sufficient data for holding successful focus group conversations.

Questionnaire responses are grouped according to the four elements of the Gender Integration Framework (noted above) which allows for graphic presentation of how well the organization is addressing gender equality on these four elements (see Figure 1, page 13). Also, using the long questionnaire, responses can be grouped according to two areas of organizational processes: programming and operations. Programming dimensions include information related to program planning and design, program implementation, technical expertise, monitoring and evaluation, and partner organizations (Table 1). Organizational dimensions look at an organization's gender policies, staffing, human resources, advocacy, public relations, and communications, financial resources, and organizational culture (Table 2).

The rest of this section describes how to conduct first, the long, and then the short Gender Audit questionnaires, including: question formats, deciding on a survey sample, analyzing results, and presenting results to staff.



Questionnaire – Long Version

The goal of the survey process is for you to gather as much information as possible from staff about what they believe the organization is doing to advance gender equality in its programs and projects as well as in its internal operations. The survey also helps you create a baseline of where staff believe your organization is related to institutionalizing gender equality.

The long questionnaire consists of 78-93 questions, divided into two sections, plus a demographics section at the end. The two sections are 1) programming, and 2) operations, each with specific dimensions shown in Tables 1 and 2. A complete survey instrument is included in Appendix D and a list of questions can be found on pages 28-31 of this handbook.

The Programming side includes five dimensions: 1) program planning and design, 2) program implementation, 3) monitoring and evaluation, 4) technical expertise, and 5) partner organization relations. Table 1 provides an explanation of the kind of information each subsection seeks from questionnaire respondents.

Table 1. Programming Dimensions

Programming Dimensions	Types of Information Sought
Program Planning & Design	The extent to which gender sensitive organizational procedures and methods are used to conceptualize and design development and humanitarian assistance projects in the field.
Program Implementation	The extent and intensity of gender responsive implementation of field projects.
Monitoring & Evaluation	The extent and intensity with which gender disaggregated data and information is incorporated in the monitoring and evaluation of organizational projects and program outcomes.
Technical Expertise	The extent and frequency of technical gender expertise in the organization.
Partner Organizations	The extent to which gender equity is integrated in an agency's partner or local NGO affiliate relations.

On the organizational side, six dimensions are explored: 1) gender policy, 2) staffing, 3) advocacy, marketing and communications, 4) organizational culture, 5) human resources, and 6) financial resources. Table 2 lists these six dimensions and the types of information sought from each.

Table 2. Organizational Dimensions

Organizational Dimensions	Types of Information Sought
Gender Policy	The nature, quality, extent and intensity of support for the organization's gender policy
Staffing	The extent of gender balance in organizational staffing patterns.
Advocacy, Marketing and Communications	The quality and extent of gender sensitivity in the organization's communications and advocacy campaigns.
Organizational Culture	The extent and intensity of gender sensitivity in the organizational norms, structures, systems, processes and relations of power.
Human Resources	The level, extent and intensity of gender sensitive human resource policies, family friendly policies, and gender considerations in hiring and personnel reviews.
Financial Resources	The level and extent of organizational resources budgeted to support gender equity efforts.

Question formats

The survey questions are designed to elicit three types of information concerning the status of gender equality in your organization. The categories seek to find out: 1) to what extent, 2) to what intensity, and 3) with what frequency. Each question type is described below.

To what extent?

These questions or statements are designed to determine **how much** staff feel your organization is doing related to advancing gender equality in program, projects, and organizational processes. So, for example, some questions ask to what extent gender equality is mandated in the design of field projects, or, how much gender criteria are included in proposal reviews, or if the organization has a written gender policy. Responses indicate the degree to which the respondent believes these actions or documents exist within the organization. These questions have the following response choices:

NOT AT ALL	There is no policy or system in place, little awareness by staff, no training available, and no expressed commitment by leadership.
TO A LIMITED EXTENT	There is a policy being developed or in place but not implemented, the system is somewhat effective, dialogue on values or norms has begun, minimal training provided, leadership supportive but not proactive.
TO A MODERATE EXTENT	There is a policy in place and usually implemented, the system is usually effective, values and norms are commonly expressed, training is available to some staff, and leadership is clearly supportive.
TO A GREAT EXTENT	Policy is fully in place and reliably implemented, the system is usually effective, values and norms are widely shared, training is widely implemented, and leadership is strongly and visibly committed.
TO THE FULLEST EXTENT	A comprehensive policy is fully implemented and monitored, the system is very clear and effective, value and norms are widely shared and evident in actions, there are well-designed training programs regularly available for a large number of staff, and leadership champions the issue.

To what intensity?

These questions or statements are designed to determine to **what degree** a respondent agrees or disagrees with statements about actions taken in the organization related to gender equality. So, for example, a question might ask if a respondent agrees that everyone in the organization feels ownership for the gender policy, or if good performance related to gender quality is rewarded in my organization. Responses indicate how much the respondent agrees or disagrees that those conditions are present in the organization. These questions have the following response choices:

STRONGLY AGREE	very clear and strong support for the statement
AGREE	support for the statement
NO OPINION	neither support nor lack support for the statement
DISAGREE	lack of support for the statement
STRONGLY DISAGREE	very clear and strong lack of support for the statement

With what frequency?

These questions or statements are designed to determine **how often** specific gender equality actions take place in the organization. So, for example, a question might ask a respondent how often advisory teams include a person with gender expertise, or how often management takes responsibility for the implementation of the gender policy.

Responses indicate how often the respondent believes those actions take place in the organization. These questions have the following response choices:

ALWAYS	very consistent and regular practices, behaviors and implementation of policies
FREQUENTLY	fairly reliable practices, behaviors and implementation of policies
OCCASIONALLY	irregular practices, behaviors and implementation of policies
SELDOM	infrequent, inconsistent practices, behaviors and implementation of policies
NEVER	no practice, behaviors or implementation of policies

Survey Questions

The questionnaire attempts to create a picture of staff knowledge and perceptions regarding the status of gender equality in their organization. Table 3 lists all questions of the questionnaire, showing the sub-sections as described above. It is important to know exactly what questions are asked to understand the meaning of the answers given in response. Answer choices are not shown but are included in Appendix D, where you will find the exact format of the questionnaire.

Table 3. List of Questions

1. PROGRAMMING

a. Program Planning & Design

This section focuses on the procedures and methods used by your organization to conceptualize, design, and monitor programs and field projects.

1. Is gender mandated by your organization to be included in all programs/projects?
2. Are gender equality goals and objectives included in program/project designs?
3. For each program/project, is there a needs assessment that includes an analysis of gender roles and responsibilities in the targeted community?
4. Do you use “best practices” for integrating gender into new programming in your organization?
5. Are questions or criteria related to gender included in your program/project proposal review and approval process?
6. Does your organization use participatory methods to incorporate the views and preferences of both male and female community members in project design?

b. Program Implementation

This section focuses on how projects actually operate in the field.

1. Do your project implementation plans include activities that specifically strengthen skills and provide women/girls with equal access to services and training?
2. Do your project implementation plans include activities that specifically strengthen skills and provide men/boys with equal access to services and training??
3. Do your project implementation plans take into account existing gender roles and interests of both female and male participants?
4. Female beneficiaries of my organization’s programs/projects value and see our programs/projects as

beneficial to their lives.

5. Male beneficiaries of my organization's programs/projects value and see our programs/projects as beneficial to their lives.
6. My organization has developed the capacity to recognize and handle organizational resistance to addressing gender issues in our projects/programs.
7. **For National Office Staff Only (all others, please skip to next section):** What are some of the obstacles to incorporating gender analysis in planning, implementation and evaluation in the national office? Please check all that apply.
 - a. organizational size
 - b. level of staffing
 - c. office culture/environment
 - d. national culture
 - e. lack of financial resources for gender programming
 - f. lack of staff training on gender
 - g. lack of gender analysis tools
 - h. lack of support from senior management
 - i. low organizational priority for gender issues

c. Technical Expertise

This section focuses on the level of the staff's expertise in gender analysis and evaluation.

1. Is there a person or department responsible for gender in your organization?
2. Are there staff who are assigned responsibility for gender integration in different departments throughout your organization?
3. Does your organization consistently draw upon a person or division within the organization who is responsible for gender programming?
4. Does staff in your organization have the necessary knowledge, skills and attitude to carry out their work to include gender?
5. Is adequate training in gender planning and analysis provided for project and program staff?
6. Program/project planning, monitoring, evaluation, and advisory teams in my organization consist of members who are gender-sensitive.
7. Program/project planning, monitoring, evaluation, and advisory teams in my organization include at least one person with specific expertise and skills in gender issues.

d. Monitoring and Evaluation

This section focuses on the extent to which gender-disaggregated data and information is incorporated in the monitoring and evaluation of your organization's projects and on program outcomes.

1. Is gender disaggregated data collected for projects and programs?
2. Is the gender impact of projects and programs monitored and evaluated?
3. Does your organization have sector specific indicators that include a gender dimension?
4. Gender disaggregated data provides useful information for program/project evaluation and subsequent program/project design.
5. My organization's programs/projects contribute to the empowerment of women/girls and the changing of unequal gender relations.
6. My organization's programs/projects contribute to increased gender equality in following areas:
 - a. material well being
 - b. access to resources
 - c. access to training
 - d. participation in decision-making
 - e. self-respect/legal status
 - f. control over benefits/resources
7. My organization's programs/projects collect gender-disaggregated data in following areas:
 - a. material well being
 - b. access to resources
 - c. access to training
 - d. participation in decision-making
 - e. self-respect/legal status
 - f. control over benefits/resources
 - g. participation in the public sector
 - h. beneficiaries view of the project's benefit to their lives

e. Partner Organizations

This section focuses on the level of gender integration in the organization's relations with partner or local NGO affiliate organizations.

1. Is commitment to gender equality a criterion in your organization's selection of partner or local NGO affiliates?
2. Is a gender policy included in the written agreements outlining your organizations relationship with partner or local NGO affiliates?
3. Does your organization provide training and tools on gender planning, analysis, and evaluation to partner or local NGO affiliate staff?

2. ORGANIZATION

a. Gender Policy

This section focuses on the nature and quality of your organization's gender policy.

1. Does your organization have a written gender policy that affirms a commitment to gender equality?
2. Does your organization's gender policy have an operational plan that includes clear allocation of responsibilities and time for monitoring and evaluation?
3. Is gender taken into account during strategic planning for organizational activities?
4. Everyone in my organization feels ownership over the gender policy.
5. Management takes responsibility for the development and implementation of the gender policy.

b. Staffing

This section focuses on the gender composition of staff in your headquarters and field offices.

1. At headquarters, there a good balance of women and men represented in senior management.
2. In the field, there a good balance of women and men represented in senior management.
3. Women and men are both strongly represented on my organization's board.
4. Are there proactive strategies implemented to recruit or promote women into senior management positions?
5. Are there proactive strategies implemented to recruit or promote men into senior management positions?
6. Does management show respect for diversity in work and management styles in your organization?

c. Human Resources

This section focuses on human resources policies and the level and extent of gender equality in hiring considerations and personnel related matters (performance assessment).

1. Does your organization have a written equal opportunity policy?
2. Are there flexible work arrangements in your organization?
3. Is staff encouraged to take advantage of flexible work arrangements (alternate work hours, working from home, etc.)?
4. Is there a paternity leave policy?
5. Is staff encouraged to take advantage of maternity leave?
6. Is staff encouraged to take advantage of paternity leave?
7. Is there a child care and dependent care leave policy?
8. Do job descriptions for professional positions include a skills requirement related to gender in development?
9. Do job descriptions for professional positions include a skills requirement related to gender in development?
10. Is "gender" a measure included in professional staff's job performance criteria?
11. Is there training of staff in gender awareness and sensitization?
12. Is there training of senior management and members of your board to institutionalize gender equality in management?
13. My organization promotes teamwork, involving both men and women as equal partners.
14. Management is committed to promoting female representation at senior levels of my organization, including the board.
15. There has been an increase in the gender expertise of staff in my organization.
16. Good performance in the field of gender is rewarded in my organization.

d. Advocacy, Public Relations, and Communications

This section focuses on the quality and gender sensitivity in your organization's communication and advocacy campaigns.

1. Are advocacy campaigns and initiatives planned and informed by a gender equality perspective?
2. Are public relations campaigns and initiatives planned and informed by a gender equality perspective?
3. Are your advocacy policies and plans influenced and advised by women's organizations, networks, and gender experts?
4. Are your public relations policies and plans influenced and advised by women's organizations, networks, and gender experts?
5. Is gender equality incorporated in your organization's communications, fund-raising and media strategies?
6. Is a gender perspective reflected in your publications, for example, brochures, articles, newsletters, books?

e. Financial Resources

This section focuses on the level of the resources in your organization that are budgeted specifically for gender equality.

1. Has your organization budgeted adequate financial resources to support its gender integration work?
2. Are adequate financial resources allocated for implementation of your organization's gender policy at all levels?
3. Is staff training on gender equality and gender analysis systematically and consistently budgeted for in your organization?

f. Organizational Culture

This section focuses on the level of gender sensitivity in the culture of your organization.

1. Does your organization encourage gender sensitive behavior, for example in terms of language used, jokes and comments made?
2. Does your organization reinforce gender sensitive behavior and procedures to prevent and address sexual harassment?
3. Is staff in your organization committed to the implementation of a gender policy?
4. Are gender issues taken seriously and discussed openly by men and women in your organization?
5. Is gender stereotyping (e.g., "those feminists," "the gender police") addressed and countered by individual staff members in your organization?
6. There is a gap between how women and men in my organization view gender issues.
7. The staff in my organization is enthusiastic about the gender work they do.
8. Staff in my organization thinks that the promotion of gender equality fits into the image of our organization.
9. Women in my organization think that the organization is woman friendly.
10. Men in my organization think that the organization is woman friendly.
11. My organization has a reputation of integrity and competence on gender issues amongst leaders in the field of gender and development.
12. My organization could do much more than it is currently doing to institutionalize gender equality.
13. The organizational culture of my organization places a higher value on the ways males tend to work and less value on the ways females tend to work.
14. Meetings in my organization tend to be dominated by male staff.
15. The working environment in my organization has improved for women over the past two years.
16. It is unfair to promote women/girls more than men/boys in my organization's programs/projects.
17. It is unfair to promote men/boys more than women/girls in my organization's programs/projects.
18. In my organization, males have a much easier time establishing personal and professional networks within the organization than do females.
19. In your organization, what are three characteristics of an ideal worker?
20. What do you think your organization should do to fully integrate gender equality (mainstream gender)?
21. Please describe any successes or challenges you have experienced in integrating gender in programming or other aspects of work in your organization.

3. DEMOGRAPHICS

1. Are you female or male?
2. What is your position in your organization?
3. How many years have you worked at your organization?
4. Where is your base of work located?
5. What is your age?

Q# .

Sampling Strategies

The information you obtain from the survey responses should come from staff who represent a wide cross-section of your organization, from all levels, departments, positions, etc. For some organizations, this will require you to select a sample of individuals to participate, while in other organizations, all staff will participate. Depending on the size of your organization, we recommend the following strategies to select which staff will complete the questionnaire.

- For **small to medium organizations** or small **country offices** (less than 100 staff): you should have all staff complete the questionnaire.
- For **medium to large organizations**: you should choose a representative sample of at least 25-30% of your staff. You should ensure a proportional number of respondents from each unit or department including overseas offices (if applicable).
- Organizations with a large number of non-program staff may wish to administer the Program Section of the questionnaire only to program staff, especially if non-program staff are unfamiliar with the specific details of the organization's programs and projects. In this case, use the following guide:
 - **non-program staff**: complete the Organization Section of the questionnaire only.
 - **program staff**: complete the entire questionnaire.

Survey Distribution

Today, many organization staff have access to computers and the internet and, therefore, can complete a questionnaire on line. For this reason, on line survey tools are a very useful resource for creating and administering the Gender Audit Questionnaire. On line survey programs include Survey Monkey (<http://www.surveymonkey.com/>), Zoomerang (<http://www.zoomerang.com/>), Surveygizmo (<http://www.surveygizmo.com/>), among others. You can create your own survey instrument using one of these or other on-line survey software packages. They are very intuitive to use. When you administer the survey you can ensure confidentiality because you will not connect email addresses to responses.

Collecting Data

InterAction has found that the response rate for the Gender Audit questionnaire increases not only when a detailed communications strategy is in place and when senior leadership promote the process, but also when issues of confidentiality are made part of the design of administering the questionnaire. Consequently, InterAction recommends that the questionnaire be delivered to staff in some way that ensures confidentiality.

Organizations that have conducted gender audits have used the following methods:

- creating a special email address for staff to return completed questionnaires, and which only one person (such as your gender advisor) has access to,
- using an online survey program such as Survey Monkey (there are several online programs available), or
- distributing hard-copy versions of the questionnaire via interdepartmental mail with a return envelope (or some other return mechanism)

If you use an online, internet, or email format for delivering your organization's questionnaire, you need to be sure that all staff in your organization who will participate actually have access to a computer as well as the skills necessary to complete an online or email survey. For more information on ensuring confidentiality, see page 41 of this handbook.

Analyzing Results

Once you have collected staff responses to the questionnaire, you can begin data analysis. The data can be tallied by hand, calculator or using a statistical analysis software package like SAS, SPSS, among others.² InterAction recommends that you conduct the following three types of analysis on data you collect from the questionnaire:

1. Univariate Analysis
2. Composite Measure Analysis
3. Bivariate Analysis

Univariate Analysis

Univariate analysis focuses on the responses of a single question at a time. It helps describe the range and average answers that respondents provide to each question. For example, when we calculate descriptive statistics for responses to the question "*Program/project planning, monitoring, evaluation and advisory teams in my organization consist of members who are gender-sensitive,*" we may find an average response of "occasionally," with 6% saying "always," 23% reporting "frequently," 30% saying "occasionally," 26% reporting "seldom," and 15% saying "never."

Arriving at these percentages is straightforward. You tally the number of respondents who have provided the same response for each question. In other words, you count the number of respondents who strongly agree, agree, etc. for each question. The totals for each response category can then be translated into percentages by dividing that number by the total number of respondents. Hence, if there were 100 staff that filled out the questionnaire and 20 of them strongly agreed with the first question, it would translate to 20%. It is important to translate the number of responses into percentages since percentages facilitate comparisons across questions. It is also useful to identify the average answer for each question. Since the *Gender Audit* questionnaire response categories are ordinal, the response category with the most responses represents the average answer.

Composite Analysis

A composite measure analysis is a way to lump together several questions that represent a concept, such as "technical capacity" or "political will." By combining the answers respondents provide on multiple questions that represent a single concept, you can calculate what we call an "index" score for that indicator. You may find that respondents on average rate the level of gender integration in the organization's technical capacity as 1.8 on a scale of 1-5 with one being low and five being high.

Creating a composite measure or index score is a three-part process.

1. Identify the questions that make up the concept or dimension you wish to measure. InterAction recommends that you create composite measures for the five **programming dimensions** and the six **operations dimensions** as well as the four **Gender Integration Framework dimensions**. To associate specific survey questions with variable names and with each programming and each operations dimension, refer to the Long Questionnaire Codebook in Appendix E of this handbook and to calculate the GIF dimension indices, see Table 4 and Table 7 in this handbook.
2. Sum the scores for each respondent's answer to the questions for the selected dimension. Be sure to exclude "don't know" responses.

² Information on SPSS, Statistical Packages for the Social Sciences, may be found at <http://www.spss.com>

3. Divide the sum by the number of questions for the selected dimension. The result is a composite measure for each respondent. Once you have calculated the composite score for each respondent, you can proceed to calculating the average composite score for the entire sample.

Bivariate Analysis

Bivariate analysis opens the possibility to explore cause and effect by focusing on two variables at a time. Of particular interest in a bivariate analysis are the differences in female and male or other demographic staff responses (position, age, etc.) to the gender audit questions. We may find, for example, that more men either agree or strongly agree that their organization places more value on the way men work and less on the way women work. Because the response categories for the questions are ordinal, InterAction recommends that you **cross-tabulate** (or, compare) the answers to the questions in the program and organization sections with the answers to the questions in the demographic section of the questionnaire. This analysis allows you to highlight patterns that emerge, which answers the question: "Does knowing a respondent's sex, position, age or region of work help to better predict their responses to the questions?" If you are using a statistical software package, measures of association (Cramer's V and/or the Contingency Coefficient) should be calculated and you should conduct the **chi-square test** of statistical significance. The measures of association indicate the extent and strength of the relationship between the demographic factors and the responses to the programming and organization questions. The test of statistical significance lets you know to what extent the results you found in the crosstabulations could have occurred simply by chance or are systematic (meaning the differences in the answers are related to the differences in the demographic factors, like whether one is male or female, in the field or at headquarters, etc.).

InterAction also recommends that you calculate the correlation (Spearman's Rho) for the composite measures, particularly the four concepts in the *Gender Integration Framework* in Figure 1. The correlation analysis helps you to identify the strength of the relationship between political will, organizational culture, technical capacity and accountability.

Table 4. Bivariate Analysis

Gender Integration Framework Dimensions	Variables
Political Will	Mandate, goals, criteria, policy, plan, strategy, own, manage, senior1, field1, board, recruit1, diverse, budget 1-3
Technical Capacity	All the questions in the technical expertise sub-section of the questionnaire
Accountability	Data, impact, sector, design, power, job 1-2
Organizational Culture	All the questions in the organizational culture sub-section of the questionnaire

Narrative Responses

Narrative responses should be reviewed to get a sense of respondents' range of answers. For the question on the characteristics of a good worker, the top responses should be tallied and presented. For the question on recommended actions, top responses should be tallied and presented. Responses to this question should also be grouped into the four concepts of the *Gender Integration Framework*. Finally, a sampling of frequent and interesting answers to the question on successes and failures should also be presented.



Questionnaire – Short Version

Many organizations will not have the time, staff resources, or capacity to conduct the longer version of the questionnaire. Therefore, we have designed a short version which allows you to build your own questionnaire using the same questions contained in the long version. Templates and samples are provided in this section so you can select the questions that best fit your organization’s needs. For example, if you are planning the survey in a field office only, you might choose not to include questions related to headquarters. Or, if you have a strong gender training program, you may choose questions specifically about gender training to assess what staff members think about it.

The sections that follow are intended to help you design and conduct the short survey process to yield strong results about gender in your organization.

Creating the Questionnaire

To use the short questionnaire, you can either choose the version provided in this section (see Table 5 and Appendix F) or you can build your own questionnaire, adding questions to the template found in Table 6. Questions separated by the Gender Integration Framework can be found in Table 7. The sample version provided below is ready to go and you do not need to change it. To build your own questionnaire use the Gender Audit Short Questionnaire Template and select questions from each GIF component (political will, accountability, technical capacity, and organizational culture) that you will insert into your questionnaire.

Table 5. Sample Short Gender Audit Questionnaire – Ready to Use

InterAction Gender Audit				
<i>A Tool for Organizational Transformation</i> [©]				
Questionnaire Short Version				
<i>Read through the questions and think about your organization. For each statement, think about how much you believe your organization is doing that activity. Write a number from 1 to 5. 1 means you think your organization is doing that activity only to a very small degree where 5 means you think your organization is doing that activity to a very great degree. Based on your scores combined with other staff in your organization, you will be able to develop strategies to move your organization toward gender equality.</i>				
Use the following scale to rate each of the statements below				
1	2	3	4	5
<i>To a very small degree</i>		<i>To a moderate degree</i>		<i>To a very great degree</i>
<p>_____ 1. The integration of gender equality in programs/projects is mandated in my organization.</p> <p>_____ 2. My organization has a written policy that affirms a commitment to gender equality.</p> <p>_____ 3. Senior management actively support and take responsibility for the implementation of the policy (or for promoting gender equality, if no policy exists).</p> <p>_____ 4. There has been an increase in the representation of women in senior management positions in the past few years.</p>				

- _____ 5. My organization has budgeted adequate financial resources to support our gender integration work.
- _____ 6. There is a person or division responsible for gender in my organization.
- _____ 7. Staff has the necessary knowledge, skills and attitude to carry out their work with gender awareness.
- _____ 8. Program/project planning, implementation, evaluation, and advisory teams in my organization consist of members who are gender-sensitive.
- _____ 9. Program/project planning, implementation, evaluation, and advisory teams in my organization include at least one person with specific expertise and skills in gender issues.
- _____ 10. Gender analysis is built into our program planning and implementation procedures.
- _____ 11. Gender analysis is built into our program evaluation procedures.
- _____ 12. Data collected for projects and programs is disaggregated by sex.
- _____ 13. The gender impact of projects and programs is monitored and evaluated.
- _____ 14. My organization's programs/projects contribute to the empowerment of women/girls and the changing of unequal gender relations.
- _____ 15. Gender awareness is included in job descriptions and/or in job performance criteria.
- _____ 16. Gender issues are taken seriously and discussed openly by men and women in my organization.
- _____ 17. My organization has a reputation of integrity and competence on gender issues amongst leaders in the field of gender and development.
- _____ 18. The working environment in my organization has improved for women over the past two years.
- _____ 19. Staff in my organization is committed to the advancement of gender equality.
- _____ 20. My organization has made significant progress in mainstreaming gender into our operations and programs.
- _____ 21. What do you think your organization should do to mainstream gender equality? (*Write in response*)
- _____ 22. Please describe any successes or challenges you have experienced in integrating gender in programming or other aspects of work in your organization. (*Write in response*)

About You

1. Are you female or male? (check a box)
 female male
2. What is your position in your organization?
 support staff

administrative staff
 program staff
 management staff

3. How many years have you worked at your organization?
Write in number of years here:

4. Where is your base of work located?
 field office
 headquarters

5. What is the best description of your department within the organization?
 technical program office
 administrative/human resources office
 executive office
 contracts/finance office
 other

6. What is your age?
Write in number of years here:

Q# .

Building your own short questionnaire starts with the template below in Table 6 and the survey questions separated by Gender Integration Framework dimension listed in Table 7. Insert questions into the blank questionnaire template from those listed in Table 7 drawing from each of the *Gender Integration Framework* components. Select questions you believe will help you understand how staff think the organization is doing to promote and advance gender. In the “Build Your Own” template all political will questions are lumped together, as are all technical capacity, organizational culture, and accountability questions. To increase the strength of your survey instrument, we suggest you mix the order of the questions before giving to staff to complete.

Table 6. Short Gender Audit Questionnaire “Build Your Own” template

InterAction Gender Audit

A Tool for Organizational Transformation[®]

Questionnaire Short Version

Read through the questions and think about your organization. For each statement, think about how much you believe your organization is doing that activity. Write a number from 1 to 5. 1 means you think your organization is doing that activity only to a very small degree where 5 means you think your organization is doing that activity to a great degree. Based on your scores combined with other staff in your organization, you will be able to develop strategies to move your organization toward gender equality.

Use the following scale to rate each of the statements below

1	2	3	4	5
<i>To a very small degree</i>		<i>To a moderate degree</i>		<i>To a great degree</i>

Insert below a minimum of five questions from the **Political Will** questions. Do not include this text or a Political Will heading on the final questionnaire. See sample questionnaire.

- ___ 1.
- ___ 2.
- ___ 3.
- ___ 4.
- ___ 5.

Insert below a minimum of five questions from the **Organizational Culture** questions. Do not include this text or an Organizational Culture heading on the final questionnaire. See sample questionnaire.

- ___ 6.
- ___ 7.
- ___ 8.
- ___ 9.
- ___ 10.

Insert below a minimum of five questions from the **Technical Capacity** questions. Do not include this text or a Technical Capacity heading on the final questionnaire. See sample questionnaire.

- ___ 11.
- ___ 12.
- ___ 13.
- ___ 14.
- ___ 15.

Insert below a minimum of five questions from the **Accountability** questions. Do not include this text or an Accountability heading on the final questionnaire. See sample questionnaire.

- ___ 16.
- ___ 17.
- ___ 18.
- ___ 19.
- ___ 20.

Insert below at least two open-ended questions. Be sure to include sufficient space for respondents to write in their answers. See sample questionnaire.

- ___ 21.
- ___ 22.

About You

Include several demographic questions. Samples of these are noted in the sample questionnaire in Table 5. Issues of confidentiality should be considered when asking for demographic information (for more details, see page 41 of this handbook).

Q# .

Table 7. Build your own questionnaire: choose at least 5 questions from each GIF category.

Political Will

1. Is the integration of gender equality in programs/projects mandated in your organization?
2. Are gender equality goals and objectives included in program/project design?
3. For each program/project, is there a needs assessment, including an analysis of gender roles and responsibilities in the targeted community?
4. Does your organization have a written gender policy that affirms a commitment to gender equality?
5. Does your organization's gender policy have an operational plan that includes clear allocation of responsibilities and time for monitoring and evaluation?
6. Is gender taken into account during strategic planning for organizational activities?
7. Everyone in my organization feels ownership over the gender policy.
8. Management takes responsibility for the development and implementation of the gender policy.
9. At headquarters, has there been an increase in the representation of women in senior management positions in the past few years?
10. In the field, has there been an increase in the representation of women in senior management positions in the past few years?
11. Has there been an increase in the representation of women on your organization's board in the past few years?
12. Are there proactive strategies implemented to recruit or promote women into senior management positions?
13. Does management show respect for diversity in work and management styles in your organization?
14. Has your organization budgeted adequate financial resources to support its gender integration work?
15. Are financial resources allocated for the operationalization of the gender policy at all levels?
16. Is staff training in gender equality issues and gender analysis systematically budgeted for in your organization?

Organizational Culture

1. Does your organization encourage gender sensitive behavior, for example, in terms of language used, jokes, and comments made?
2. Does your organization reinforce gender sensitive behavior and procedures to prevent and address sexual harassment?
3. Is staff in your organization committed to the implementation of a gender policy?
4. Are gender issues taken seriously and discussed openly by men and women in your organization?
5. Is gender stereotyping (e.g., “those gender blind men” or “those feminists”) addressed and countered by individual staff members in your organization?
6. There is a gap between how men and women in my organization view gender issues.
7. The staff in my organization are enthusiastic about the gender work they do.
8. Staff in my organization think that gender equality fits into the image of our organization.
9. Women in my organization think that the organization is woman friendly.
10. Men in my organization think that the organization is woman friendly.
11. My organization has a reputation of integrity and competence on gender issues amongst leaders in the field of gender and development.
12. My organization could do much more than it is currently doing to institutionalize gender equality.
13. The organizational culture of my organization places a higher value on the ways males tend to work and less value on the ways females tend to work.
14. Meetings in my organization tend to be dominated by male staff.
15. The working environment in my organization has improved for women over the past two years.
16. It is unfair to promote women/girls more than men/boys in my organization’s field programs /projects.
17. It is unfair to promote men/boys more than women/girls in my organization’s field programs /projects.
18. In my organization, males have a much easier time establishing personal and professional networks within the organization than do females.
19. In your organization, what are three characteristics of the ideal worker?
20. What do you think your organization should do to mainstream gender equality?
21. Please describe any successes or challenges you have experienced in integrating gender in programming or other aspects of work in your organization.

Accountability

1. Is gender disaggregated data collected for projects and programs?
2. Is the gender impact of projects and programs monitored and evaluated?
3. Does your organization have sector specific indicators that include a gender dimension?
4. Gender disaggregated data provides useful information for program/project evaluation and subsequent program/project design.
5. My organization’s programs/projects contribute to the empowerment of women/girls and the changing of unequal gender relations.
6. Is gender awareness included in all job descriptions?
7. Is gender awareness included in job performance criteria?

Technical Capacity

1. Is there a person or division responsible for gender in your organization?
2. Is there assigned staff responsibility for gender integration in different departments?
3. Does your organization consistently draw upon a person or division within the organization who is responsible for gender programming?
4. Does staff have the necessary knowledge, skills and attitudes to carry out their work with gender awareness?
5. Is there training of project and program staff in gender planning and analysis?
6. Program/project planning, monitoring, evaluation, and advisory teams in my organization consist of members who are gender sensitive.
7. Program/project planning, monitoring, evaluation and advisory teams in my organization include at least one person with specific expertise and skills in gender issues.

Selecting a Sample – Distributing the Survey – Ensuring Confidentiality

After you have decided on the type of questionnaire you will use and have created the short version that fits your organizational needs, you need to select your sample and consider the process you will use to ensure that the identities of all respondents are protected. It is important not only that people who complete the survey come from all levels and departments within your organization, but also that respondents feel their responses can not be identified or associated with them.

Sampling

As stated earlier (see Sampling section on page 32), for smaller organizations or departments, you may wish to have every staff member complete the questionnaire. For larger organizations, you should decide on the number of staff to participate, making sure that the staff you ask to participate represent as many departments and levels within the organization as possible. If you are using paper surveys, we suggest you number the questionnaires. A box (Q # __) is included on sample questionnaires for you to fill in before distributing the surveys. This way, you can keep track of the questionnaires you distribute and which are returned. You can track them according to department. For example, if you distribute numbered questionnaires as follows: #1-15 to human resources, #16-22 to executive office, #23-29 to programs unit, #30-55 to technical units, etc., you will know which departments are represented fully in your responses. You can also track response rate by department if you include demographics questions that ask department or level of position. Online survey programs will assign numbers to surveys automatically.

Distribution

When you know which staff will participate in the survey process, you need to decide how you will get the questionnaire to them. New technology allows you to conduct surveys over the internet. While this option works in many cases, some organizations may still choose to have respondents complete a paper survey and return it to a particular office or person in the organization. See Long Questionnaire section “Collecting Data” on page 32, for more suggestions and details.

Confidentiality

When you distribute questionnaires to staff, you need to ensure that after a survey is filled in, the respondent will not be identified. No one on your survey team should be able to identify which individual completed a particular questionnaire. Nor should you ever ask respondents to reveal which survey is theirs. There are several ways you can reassure staff that their responses will be confidential. You want to ensure they feel confident and able to be as honest as possible in their responses. The following are suggestions for ensuring confidentiality:

- ☑ Questionnaires should not be copied for other staff to complete. If additional surveys are needed, the gender team can make additional copies adding numbers to those questionnaires.
- ☑ Make sure that all staff who are completing questionnaires know what to do with their completed questionnaire: pass it to a designated staff member of the Gender Team or place it in a sealed box made especially for the gender audit questionnaires. For example, in USAID/Bangladesh, surveys were distributed by Gender Team members from each office in the mission. After staff completed their questionnaires, they either passed them back to the Gender Team staff member or they placed them in a special sealed box which was located in the Gender Advisor's office.
- ☑ If you are using an on-line or email process, there are several ways to protect respondents. If you use an online survey program such as Survey Monkey, etc., you can build protection into the survey process automatically. If respondents are asked to return completed questionnaires by email, you can create a special email address just for that purpose with one designated person to receive all surveys (maybe your IT person). Or, you can have all surveys returned to a specific individual in the organization (the Gender Advisor or other individual). This designee should receive all completed surveys by email, copy them, and then delete all emails received.
- ☑ For the short questionnaire you could hold a Gender Audit workshop and have each individual score their own questionnaire, then turn it in so the totals can be tallied and open-ended comments can be typed up and described.

Analyzing Results

To analyze results of the short questionnaire a scoring sheet is provided in Table 8 and Figure 2. In addition, an excel spreadsheet format for inputting results can be found in Appendix G. See Analyzing Results section for the long questionnaire, page 33. You can conduct all types of analysis suggested there except programming and operations dimensions composite measures.

Table 8. Scoring Sheet for Gender Audit Short Questionnaire Results

<h1 style="margin: 0;">Scoring Worksheet</h1> <h2 style="margin: 0;">Gender Audit Short Questionnaire</h2>
<h3 style="margin: 0;">GENDER INTEGRATION SCORES</h3>
<h4 style="margin: 0;">Political Will</h4>
Add total for questions # 1-5: _____

Divide by 5: _____

Put this number on the tree under Political Will

Technical Capacity

Add total for questions # 6-11: _____

Divide by 6: _____

Put this number on the tree under Technical Capacity

Accountability

Add total for questions # 12-15: _____

Divide by 4: _____

Put this number on the tree under Accountability

Organizational Culture

Add total for questions # 16-20: _____

Divide by 5: _____

Put this number on the tree under Organizational Culture

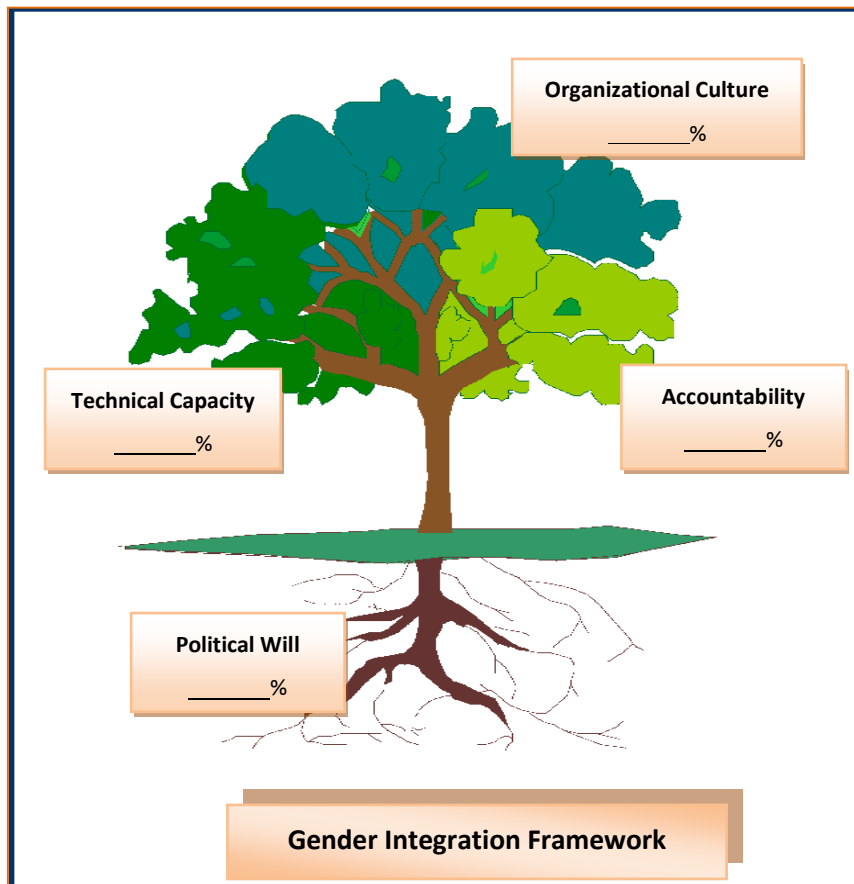


Figure 2. Gender Integration Framework with blanks

Framework developed by the Commission on the Advancement of Women. Copyright 1999. For more information, contact: InterAction - CAW, 1400 16th St, NW, Suite 201, Washington, DC 20036, Tel: 202.667.8227, Fax: 202.667.8236, Web: www.interaction.org

Both Questionnaires - Presenting Results

Once you have completed the analysis of results from either the long or short questionnaire, you should present the results to staff in your organization. It is important that staff see results at each step of the *Gender Audit* process and that they understand how each step builds towards the creation of a strong organizational action plan. Rather than having a plan developed by an outside expert, the action plan emerges from the participatory deliberations of your agency's staff. Consequently, it is important to review, summarize and display the audit results in user-friendly formats. InterAction recommends that you present survey results using two different formats:

- 1) PowerPoint presentation (Table 9, Appendices G and H)
- 2) Gender Newsletter (Appendix I – two samples)

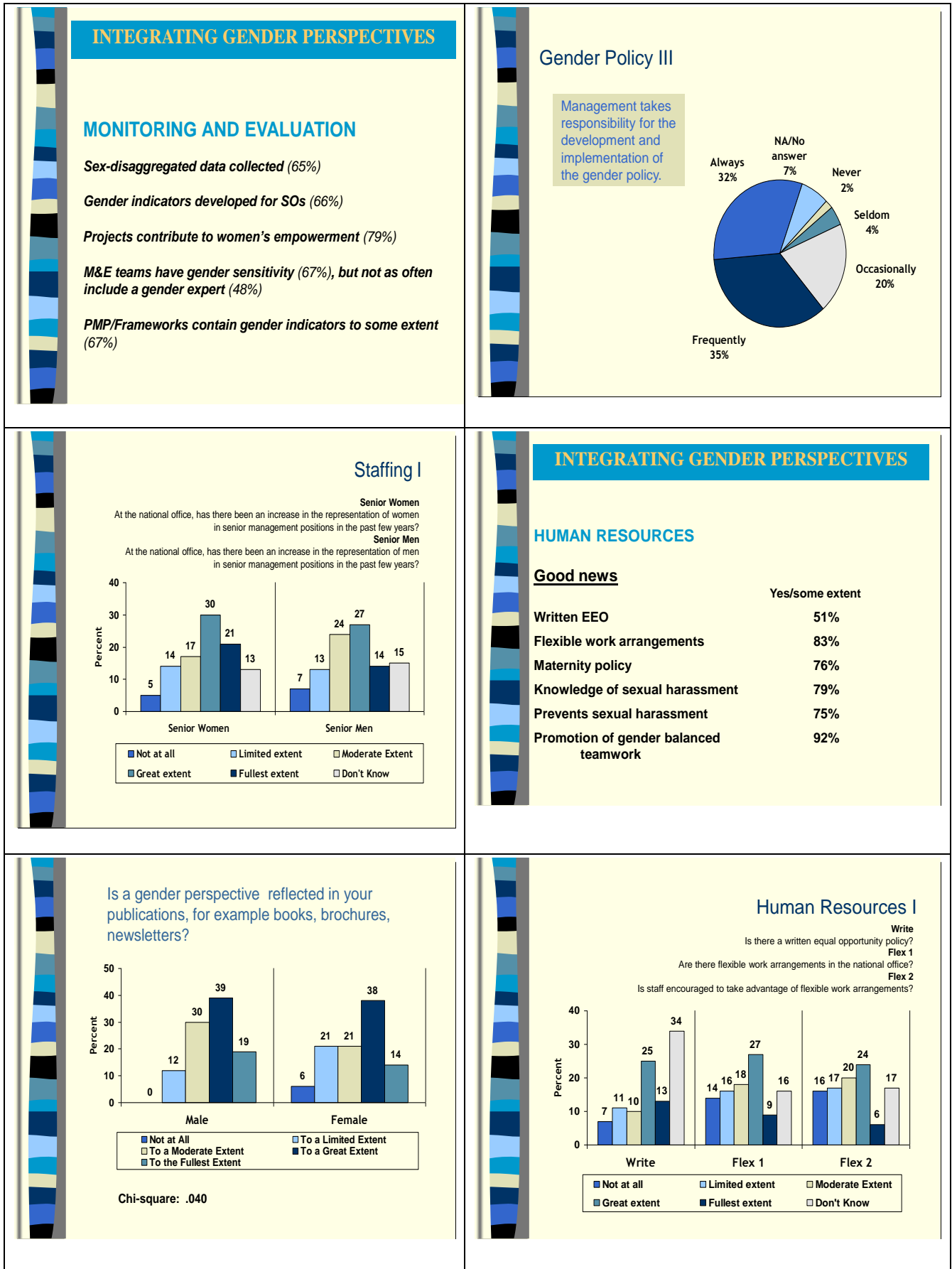
We suggest that your Gender Team prepare and present the PowerPoint to senior leadership prior to showing it to staff. The reason for this is to ensure that senior leadership is not surprised by any “less positive” results that emerge. The second vehicle for presenting survey results to staff is through a Gender Newsletter. The Gender Newsletter and PowerPoint presentation become review documents for the next steps of the audit process, the Focus Group Conversations.

InterAction has found that any presentation of data must be clear, concise, well organized and help to answer specific questions. The PowerPoint presentation provided in this handbook shows you the range of presentation formats you can use. For a typical report to staff, you would probably make a presentation of between 10 and 30 minutes. The amount of data generated from either the long or short questionnaire process is too much to present to staff. In both processes, there will be more data than can be reasonably presented to staff. So, you need to adjust your presentation to ensure that the most salient data are shown to staff. Several categories of results should be presented, which can be found in the sidebar in this section and PowerPoint slide samples also in this section. Bar and pie charts as well as tables help display different types of results. Examples of how to graphically represent survey data in a clear and easy-to-understand manner can be found in the samples provided below and in Appendix G and H.

Categories of Results That Should Be Presented

- A. The total number/percentage of staff responding to the questionnaire
- B. The percent of respondents in different positions in the organization
- C. If applicable, the regions or departments represented by respondents
- D. The percent of female and male staff responding to the questionnaire
- E. The organization's average composite score for the four components of the Gender Integration Framework (political will, technical capacity, organizational culture, accountability)
- F. For long questionnaire only, the organization's composite score for the program and organization dimensions
- G. Significant differences in female and male responses to questions
- H. Other significant differences that emerge (any “ahas” or surprises you found in the results), such as regional differences, seniority or age differences, position differences, etc.

Table 9. Presenting Results: PowerPoint slide samples





Step 3: Digging Deeper — Focus Group Conversations and Analysis

Step three of the Gender Audit process is to conduct focus group conversations with selected staff in the organization. Focus groups are a valuable way to gain additional insights and information about the beliefs and perceptions of staff in your organization regarding gender equality, gender mainstreaming, and gender integration. Focus groups are a special type of guided conversation with selected participants, 1-2 conversation leaders, and one or more note takers. The aim of these conversations is to uncover additional information about the survey results and to discover participants' vision of a "gender-equitable organization." The conversations last no more than two hours, are semi-structured with guided questions posed by the facilitator/s, who use techniques to ensure that all participant voices are heard. Participants should come from a mix of departments and positions within the organization.

Prior to conducting the focus groups, there are several things your gender team will need to decide:

- How many focus groups to hold (InterAction recommends between 4 and 10 conversations) with 10-12 participants in each group, depending on the size of your organization.
- Who will facilitate the conversations (one or two discussion leaders is recommended).
- Who will take notes (one to two notetakers is recommended).
- Whether to tape record the conversations (requires releases and involves additional logistics). Good note-takers, who've been given clear instructions of what to look for and how to take notes, should suffice.

Forming and Scheduling Focus Group Conversations

Depending on the size of your organization, you should hold between four and ten focus group sessions with between eight and ten participants in each. Plan to include representatives from different departments and levels in the organization, ensuring that the voices you hear widely represent as much of the organization as possible. Some organizations choose to separate female and male groups, managers and non-managers. You will need to decide what grouping makes most sense within your organization. When you know the types of groups you will hold, you should select participants using some type of random sampling. You can use purposeful random sampling (selecting participants randomly from particular organizational groups such as support staff, senior staff, etc.) or from a particular divisions (headquarters, program office, human resources, etc.).

As with the survey process, it is important to ensure confidentiality of focus groups participants. You can do this by reassuring participants that no one besides Gender Team members will know who were focus group participants.

Focus Group Questions

1. Which of the results of the Gender Audit Questionnaire were in line with your experiences at this organization?
2. Which results were a surprise?
3. What do you recommend that your organization do to build on its strengths and address remaining challenges?
4. What is your vision of gender equity for your organization?

And, you can tell them that note takers will not associate any individual with a specific response or comment made during the focus group. It is important that participants feel a safe space to be honest.

The maximum length of each focus group should be two hours. Facilitators should use the Gender Audit newsletter as background information for the focus groups. Focus groups should be facilitated using the four focus group questions. Both the questions and a sample Focus Group agenda are shown in side bars.

Focus Group Agenda

- A. Welcome & Introductions
- B. Review Gender Audit timeline and process (use flipchart)
- C. High survey results using GIF and index scores, if applicable (use flipchart)
- D. Discuss four Focus Group questions
- E. Recap of major points in discussion
- F. Review next steps

Identifying trends and themes

InterAction recommends that you use the Gender Integration Framework to present the big picture results from the Gender Audit Questionnaire to staff in the focus group discussions. You should include the index scores and percentage of staff recommendations for each element in the framework. See Figure 3. In the following diagram, you can see that for this fictional organization, the scores for the elements in the GIF ranged from a low of 3.3 for accountability to a high of 3.8 for political will. These scores vary on a range of 1-5 with 1 being low and 5 being high. We also see that the majority of staff recommendations (44%) dealt with technical capacity issues followed by recommendations in organizational culture and political will, both of which got 18% of the recommendations.

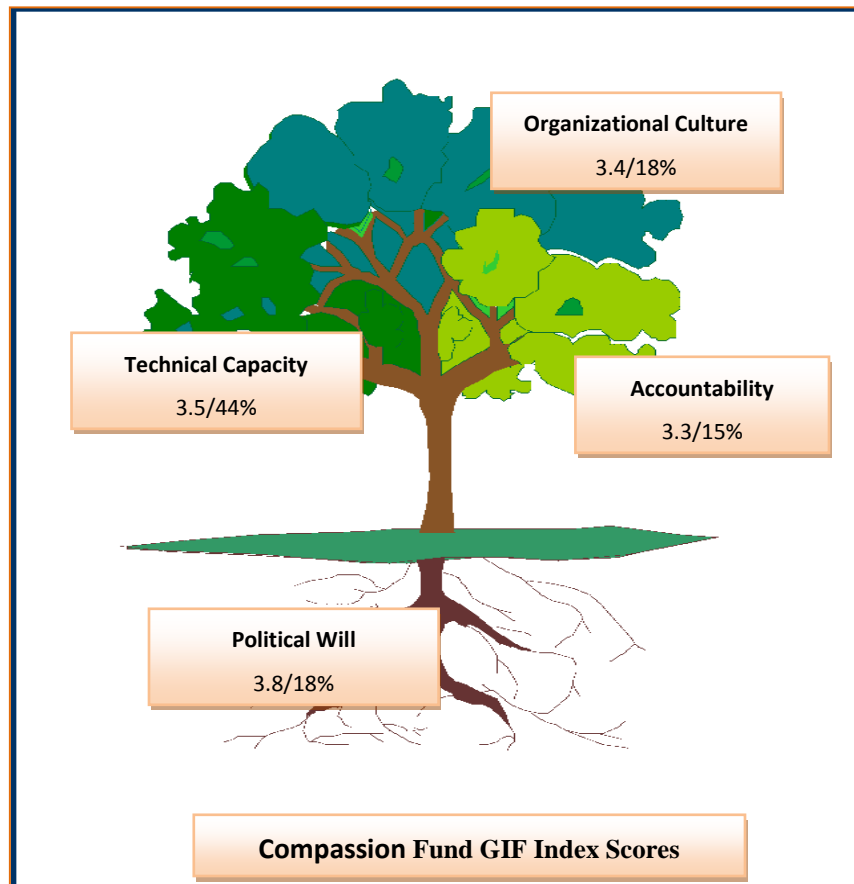


Figure 3. Gender Integration Framework with Compassion Fund Index Scores (case study)

Framework developed by the Commission on the Advancement of Women. Copyright 1999. For more information, contact: InterAction - CAW, 1400 16th St, NW, Suite 201, Washington, DC 20036, Tel: 202.667.8227, Fax: 202.667.8236, Web: www.interaction.org

Facilitation Tips

The Gender Audit focus group discussions are led by a facilitator who solicits participants' views on the results from the Gender Audit Questionnaire without imposing her or his own views. A sidebar in this section provides tips on ways to successfully facilitate the focus group discussions. There are several "tough" questions that typically come up during the Gender Audit Focus Group conversations. We offer them along with our suggested responses.

Common Questions-Concerns-Issues you may hear from Focus Group participants:

- ***"The survey questions did not make sense or the wording was unfamiliar to me so I answered "don't know" to many questions. Doesn't that mean the results are invalid?"***
 - Remind participants that one purpose of the gender audit process is educational, that is, that staff learn about gender equality and what the organization is doing to reach its own internal gender goals just by participating in the audit process. Data analysis takes into account the number/percentage of "don't know" answers, which becomes data for the organization to assess in its analysis. For example, one organization that conducted a gender audit had don't know responses ranging from 25% to 80% on some dimensions when it conducted its first gender audit. A second gender audit in the same organization five years later revealed greatly reduced numbers of don't know responses (from 20-40%). During the Focus Group conversations, the question we explored was what this result might mean.
- ***"If the survey questions only uncover the "perceptions" of staff, how do we know what is really true? If we aren't learning what is "fact" in the organization, then what's the point of this process?"***
 - The value of this process is that it uncovers what staff believe to be true in the organization. You are uncovering what staff think about gender equality. For example, if most survey respondents do not believe there is a gender policy in the organization, when, in fact, there is a gender policy, this is important information for you to have. Or, if the majority of staff respond that they believe the organizational culture supports men more than women, this information also provides you with important data. When you are able to disaggregate data by different groups (sex, staff position, etc.), you can explore these perceptions more deeply. During focus groups, remind participants that this is a learning process for the organization, with the goal of exploring what staff believe the organization is doing to promote its gender goals and how the organization can move forward to reach those goals. Through this exploratory process, you are learning what is indeed "fact" within the organization.
- ***"Why are we doing this process? There is really no issue or concern here about gender equality so this seems like a waste of time."***
 - Often, there will be some focus group participants who believe there is no problem with gender equality within the organization and who question the entire process of the audit itself. In this case, remind participants of the goals of the audit: to uncover what staff think. So, all voices are important, including theirs. And, remind them that their thought will be captured in the Focus Group notes. You can also remind them that other participants may not share this view (show them results which demonstrate this). For example, if this is an all-male focus group and there are significant differences in the responses of males and females, you should point out that difference. Use this as an opportunity to dig further into what these participants think about those differences. You may uncover new perceptions and thoughts about gender equality in the organization.

The key to facilitating focus group conversations is to recognize that participants may have questions that you cannot answer. As facilitator, it is not your role to answer or respond to specific questions during the focus groups. You may actually choose to respond to a participant question by asking a different question using the results to frame your questions, as noted above. Or, you can remind participants that the intention of the focus groups is to uncover as many ideas, thoughts, opinions, suggestions as possible and that all ideas are important, even those that are critical of the process.

Facilitation Tips

- Tip 1 Introduce the facilitation team.
- Tip 2 Provide participants with a clear introduction by stressing a few key points: everyone will be involved in the process; this is a time to give ideas and recommendations; it is not necessary to agree or to solve at this time.
- Tip 3 Present the flow of the Gender Audit process and post the steps on flipcharts around the room – use a timeline to clearly describe what has happened and where this process is leading.
- Tip 4 Remind participants how the focus group results will be used, and reassure participants that all conversation and comments will be kept strictly confidential. Remind all participants that all comments and discussion that goes on in the room must stay in the room.
- Tip 5 Show focus group discussion questions one by one.
- Tip 6 Use the tree diagram to present staff ratings on the four elements of the Gender Integration Framework.
- Tip 7 Encourage participation – call on participants to share their views, ask participants who have already spoken to hold their thoughts until other more quiet participants have had a chance to speak, use a “round robin” technique by going around the table and hearing a response from one person at a time (so that each person gets a chance to speak).
- Tip 8 Avoid getting pulled into debates. Facilitators and note takers should maintain neutrality during the conversations and should not engage in any agreement or disagreement. Facilitators should also ensure that the conversation does not become a debate. The Focus Group discussion is not about agreeing with each other, it is about getting all the ideas out.
- Tip 9 Capture main ideas on flipchart during “hot discussion” to reassure group that issues are being noted.
- Tip 10 Draw closure when a topic is exhausted and move on.
- Tip 11 Introduce successes and positive data if group becomes negative.
- Tip 12 When discussion gets bogged down, call on supportive participants.
- Tip 13 Summarize, and then reflect back.

Strategic Note Taking

Why Take Notes?

Organized notes will help you identify important issues and ideas from the focus group conversations. Identifying key points will allow those who analyze Focus Group data to pinpoint key activities that need to be included in the Gender Action Plan. Focus Group discussions may contain information not available anywhere else and this may be your only chance to learn about it. The focus group discussions are where you learn what staff thinks is important.

Note takers

The notetaker/s should be someone who is familiar with the overall process of the Gender Audit, although this is not essential. They should use a laptop or be someone who can quickly take handwritten notes. The notetaker/s should not participate in the discussion and should respond only if called on by the facilitator to help or clarify. If you are conducting separate female and male focus groups, you should have corresponding notetakers (female note taker for female group and male note taker for male group). The Focus Group facilitator or person leading the gender audit in the organization can do an orientation for the note taker/s prior to beginning the focus groups.

Note Taking Tips During the Focus Groups

1. Write down the focus group date and time, where the focus group is being held, your name as the note taker, and any other group feature (if you are holding several focus groups, you may want to number them, #1, #2, #3, etc.).
2. If agreed to, you may use a tape recorder to record the discussions.
3. Only write on one side of your paper. It's easier for you to organize your notes later.
4. Be brief in your not taking. Summarize what participants say in your own words. Your goal is to understand what is being said, not to try to record exactly what is said.
5. Use note-taking symbols to help you write faster.
6. Try to recognize main ideas by signal words that indicate something important is to follow. For example, "First, Second, Next, Then, Thus, Another important idea..." etc.
7. Jot down details or examples that support the issues being discussed.
8. Use the facilitators final summary to highlight major issues of the discussion.
9. At the end of the discussion, ask questions about points you did not understand.
10. Spend ten minutes after the focus group discussions reviewing your notes. At this time, you can change, organize, add, delete, summarize or clarify any misunderstandings.

Preparing and Compiling the Focus Group Report

The Focus Group Report is a summary of the pertinent issues and recommendations that surface during the Focus Group dialogues. The report seeks to capture new information that surfaces, as well as strong agreement or disagreement with survey results. In addition, the report details staff recommendations and vision for the organization's gender mainstreaming efforts, including their views of what the organization would look like if it fully mainstreamed gender. See Appendix J for a Focus Group Report sample/template.

Use the template in Appendix J to create your own Focus Group report, which summarizes issues and recommendations that surface during the focus group step of the audit process. Also see sidebar this page for suggested structure of the focus Group report. Along with the Gender newsletter and PowerPoint presentation from the Questionnaire step of the Audit process, the Focus Group report forms the basis from which the Gender Action Plan is developed.

With this report and other gender audit materials, you are now ready to convene your Gender Team and additional staff members, to develop a focused gender action plan that includes specific recommendations for actions, activities, and timelines that will move your organization toward full gender integration.

Focus Group Report Structure

- A. OVERVIEW OF THE ORGANIZATION'S GENDER AUDIT PROCESS
- B. FOCUS GROUP DISCUSSION QUESTIONS
- C. ISSUES AND RECOMMENDATIONS FROM FOCUS GROUP DISCUSSIONS (separated into categories, e.g., budget, human resources, gender policy, training, etc.)
- D. VISIONS OF A GENDER SENSITIVE ORGANIZATION
- E. GENERAL COMMENTS
- F. COMMENTS SPECIFIC TO COMPONENTS OF THE GENDER INTEGRATION FRAMEWORK
- G. SURPRISING RESULTS FROM THE GENDER AUDIT QUESTIONNAIRE
- H. GENDER AUDIT QUESTIONNAIRE RESULTS IN LINE WITH STAFF EXPERIENCES



Step 4: Moving Forward - Gender Action Planning

The final step of the Gender Audit process is development of your organization's Gender Action Plan, which is intended to be an on-going process which promotes real gender integration in your organization. Using results from the survey process and focus group discussions, you convene a 1- to 2-day session with gender team members and other key staff who should be involved in the conversation. For example, some organizations may wish to invite senior leaders to all or part of the Gender Action Planning session. You may also choose to invite them to either the initial or final Gender Action Plan discussions to engage them on issues and directions of the plan.

Turning Results into Action Steps

The first step in creating the Gender Action Plan is for gender team members to review the key documents that were prepared during each step of the Gender Audit process. These documents include

- 1) the gender audit questionnaire presentation (or other report format),
- 2) the gender newsletter, and
- 3) the gender audit focus group discussion report.

These documents will form the basis of the data you will use to identify recommendations and activities that your Gender Team believes will most effectively promote gender integration in your organization, and thus, must be included in your organization's Gender Action Plan.

After your team has reacquainted itself with the results documents, you should plan to hold a Gender Action Planning session during which time Gender Team members and other invited staff will develop the Gender Action Plan.

Gender Action Plan Planning Session. During this session, your aim is to create the organization's Gender Action Plan. This plan will include recommendations for action, timeframe, responsible party, and needed resources. The Gender Action Plan Planning Session creates the opportunity for participants to work together to identify those activities that will move the organization toward more effective gender integration. Many of the activities you will include in your Gender Action Plan will become evident as you look through the materials you have pulled together for the session. Through each step of the Gender Audit process, staff have made clear how they think the organization can move forward to integrate gender and these recommendations will emerge as you look systematically at the results you have amassed.

Planning Session Sample Agenda. The following sample agenda can be adapted for your specific needs.

Gender Action Plan Planning Session

Agenda (sample)

- Introductions (if necessary) and/or icebreaker
- Overview of agenda (clarification of expectations and objectives)
- Review materials: 1) questionnaire results presentation, 2) gender newsletter, 3) focus group report
- Break into the four Gender Integration Framework groups: political will, technical capacity, organizational culture, and accountability). Groups should be between 3-7 people each.
 - Each group identifies **3-5 key recommendations** from the documents that correspond with their assigned GIF component (e.g., the technical capacity small group identifies recommendations related to technical capacity, and so on). Be sure recommendations are in line with what staff have actually said (are in line with actual results) and offer a recommended timeframe for each recommendation (Quarter 1, 2, 3, etc. or Year 1, 2, 3)
 - Post recommendations on wall (color code GIF elements to distinguish)
 - Each group reports back to large group
- Large group discussion: questions, adjustments, corrections, suggestions, revisions, combine similar recommendations (may need to do in small groups, then reconvene)
- Create a chronological ordering of recommendations (which ones should happen first, second, and third, etc.)
- Agree on key recommendations, timelines, who's responsible, and resources needed

Using the Gender Action Planning Form

After the gender team has agreed on the key recommendations you heard from staff, these should be entered onto the Gender Action Plan template (see sample below and Appendix K). This template is intended to provide a way for you to organize the recommendations your team members think should be included in your organization's Gender Action Plan. It is helpful to organize the recommendations in chronological order depending on which should happen first, second, third, etc.

Your organization may already use an action planning tool which the Gender Team may choose to adapt. For example, many organization use planning worksheets, score cards, or other internal planning tools. If you organize the Gender Audit results into a Gender Action Plan that uses your own organization's planning tool it may be easier for staff to understand how it works since it is a tool they are already familiar with. They may already know how such tools get tracked and reported on within the organization. Use the tool that fits your organization best. The Gender Action Plan step is intended to help you make gender integration possible and more likely to occur. The Gender Action Plan template below is provided as a sample of the elements you should include. Change and tweak it as you see fit.

Gender Action Plan for _____ (write in name of your organization) Developed by _____ Date: _____						
ACTIVITIES	WHEN	HOW LONG	WHERE	RESPONSIBLE PARTY	WITH WHOM	RESOURCES
[sample] Update gender strategy, develop guidelines for GAD policy.	1 st Quarter 2011	6 months	All offices	GTF, QSD, HR, Finance Dirs	PO GAD	Core time, materials, funds
[sample] Build capacity of Gender Team.	Start 2011	2 years	All offices	HR, Capacity Building Unit	GAD Coordinators	Training, budget, materials travel, logistics, consultants
[sample] Review and implement a transparent appraisal system.	Year 1 - 2011	Ongoing	All offices	HR	Sr. Mgmt.	Core time

Reporting to Staff and Leadership

If senior leaders have not been involved in the Gender Action Planning process, you should schedule time to meet with the senior leadership team to share the action plan. This step ensures their continued engagement and support, crucial to adoption of the Gender Action Plan. Not all activities in the Gender Action Plan will require resources, but some will and most activities will, at least need some staff time. For this reason, it is critical that you ensure senior leadership input and support before presenting the Gender Action Plan among staff. You should have assurance that adequate human and financial resources are available to fully implement the recommendations you are proposing in the Gender Action Plan.

Next, you need to present the Gender Action Plan to staff. For many staff, this will be the first time they have heard about the *Gender Audit* since survey results were presented. So, the format of the Action Plan should help them see that their voices and ideas have been incorporated into the action planning process. There are several ways to present the Gender Action Plan to staff: 1) at a regularly scheduled staff meeting (if most staff will be present), 2) through another gender newsletter (see templates in Appendix I), or 3) in an internal email document. InterAction recommends that you use multiple methods to let staff know that the Gender Action Plan exists, that it includes staff recommendations, and that it will be assessed and monitored over time. Be sure to thank staff for their participation, input and ideas. You should also publically thank senior management for their continued support of the organization's gender integration efforts.



Summary: Follow Up and Maintenance

Monitoring your Gender Action Plan

When your Gender Team has publically presented the Gender Action Plan and it has been officially adopted, you have completed the full *Gender Audit* process. However, your gender work does not end there. Now, you must ensure that the recommendations and activities contained in the action plan are carried out, evaluated, and reviewed. To do this, InterAction recommends that your agency's Gender Officer and/or Gender Team devise a regular review time for the gender plan. This can be every quarter or as part of the gender team's regular reporting process, if applicable. It can coincide with another of your organization's regular, semi-annual or periodic reporting cycles. At a minimum, you should plan to review the gender plan at least twice per year. Some organizations have included the gender action plan on their internal "intranet" where staff who are responsible for specific activities are asked to update and add progress reports showing that activities have been completed or highlighting progress or lack of it. In addition, the Gender Team can add new activities that members have identified.

Monitoring completion of the activities in your organization's Gender Action Plan takes time and effort, which can often be overshadowed by other pressing job responsibilities. For this reason, the task of monitoring the Gender Action Plan must be included in the job responsibilities of at least one staff member. InterAction recommends that it be part of the position responsibilities of the organization's Gender Officer and be included in performance evaluation criteria for that person. In this way, continued monitoring of the Gender Action Plan is assured. Without such accountability, we believe, the responsibility of monitoring the Gender Action Plan too easily slips to the back burner. After completing gender audits, some organizations have included performance criteria related to gender integration in the job descriptions of members of the organization's Gender Team. This is another way of ensuring that staff are recognized for their gender work and gender integration is incorporated into the way you do business.

Summary

"I believe effective gender integration is often the difference between success and failure of a broad variety of development investments. I've had a history...of making sure that gender integration is done well...A lot of times there's a fair amount of language about gender integration, but there are less specific strategies to make it happen..."

— Rajiv Shah, 2009, USAID Administrator

InterAction is pleased you have completed the *Gender Audit* process and wishes you the best in your efforts to integrate gender in your organization. We know that effective gender integration improves development effectiveness and leads to greater empowerment of women and girls, in addition to added benefits for men and boys.

Gender integration is one key to effective development practice. We know that addressing the needs of women, girls, boys, and men helps improve results and impacts on the ground. Our leaders are calling on us to

account for gender in our projects and in our organizations. The *Gender Audit* tool is one mechanism to help guide you to more effective institutional gender integration.

Experience integrating gender in many institutions and within planning processes has provided us with insights into how to do this effectively. These experiences have shown that such efforts will only be successful if there is political will to move it forward, technical capacity of staff and the organization to carry it out, accountability mechanisms that require action, and an organizational culture that promotes and rewards gender equality. Resources are critical; capacity is necessary. The steps outlined in this *Gender Audit* process work and yield results that will move your organization toward effective and lasting gender integration.

Best wishes!

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³ The listed sources were consulted in the development and design of InterAction's *Gender Audit Questionnaire*. A number of the issues and questions in these documents were adapted and modified for the questionnaire.

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Appendices

Appendix A: Organizational Readiness worksheet

Appendix B: Gaining Senior Leadership buy-in PowerPoint sample and Communication Strategy Worksheet

Appendix C: Gender Integration Framework (GIF) Tree Diagram with blanks (for copying)

Appendix D: Long Questionnaire – complete format

Appendix E: Long Questionnaire – codebook

Appendix F: Short Questionnaire template

Appendix G: Short Questionnaire – Scoring rubric, Reporting Sample

Appendix H: Gender Newsletter sample (USAID/Bangladesh), Questionnaire PowerPoint Presentation template

Appendix I: Gender Newsletter templates, Samples

Appendix J: Focus Groups – Report

Appendix K: Gender Action Plan templates, Gender Action Plan samples

Appendix A

InterAction Gender Audit

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Organizational Readiness Worksheet

SIX ASPECTS OF RECEPTIVITY

For each of the following questions, consider whether you believe your organization has taken these actions, is taking them to some degree, or is not ready to take them to increase or improve gender integration in the organization. This worksheet is your *opinion* only and is not meant to represent truth. Its goal is to assist you to begin a conversation about whether your organization is ready to embark on a gender audit process. A gender team might use this worksheet to see whether each member considers the organization to be ready or not. Completing it individually, then discussing it as a group will help you launch that conversation. You might jot ideas that come to mind as you respond to each question— to discuss with others in your gender team.

		NO	SOMEWHAT	YES
1. Support in the organization				
a	Have senior managers demonstrated a commitment to mainstreaming gender equality to staff, clients, boards or funders?			
b	Are key members of the organization expressing support for incorporating programming aimed at achieving gender equality goals in the organization's work?			

2. Vision				
a	Is there a vision or clear picture of how the challenges and opportunities facing the organization regarding gender mainstreaming might be dealt with or resolved (a new structure, a new program, a new way of working or other options)?			
b	Does the vision of mainstreaming gender equity have powerful advocates in the organization? Does the leadership hold this vision?			

3. Resources

a	Are there qualified people (people trained in gender analysis or a gender specialist on staff) prepared to work to mainstream gender equity in programs and organizational structures?			
b	Are board and committee members in the organization prepared to invest the time required to mainstream gender equity?			
c	Does the organization have the resources and/or energy for implementing a gender equity initiative?			

4. History

a	Does the organization have a successful history of equitable operations and of adaptation to changing situations?			
b	Does the organization's history on gender equity work color people's view of the likelihood of change? Can you influence that?			

5. Politics

a	Has the board or executive committee authorized work on improving the current level of gender equity work to bring about change?			
b	Does the possibility of change for gender equity fit with the self-interests of the powerful members of the organization?			

6. Leadership

a	Does the need for change for gender equity have the support of powerful people in the organization?			
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Appendix B

InterAction Gender Audit

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Communications Strategy

Consider the following questions as you develop a communications strategy for the gender audit process.

- How will you communicate with senior management about conducting the gender audit? How will you communicate the gender audit process to staff? All staff? Staff who will participate? Headquarters, field staff?
- What information do they need and

Action	Who's responsible	Materials needed	Timeline
Decide on a timeline for the audit and determine best strategies to communicate with staff about upcoming audit process (note: you should plan to discuss these ideas with senior leadership)	<input checked="" type="checkbox"/> Gender Officer <input checked="" type="checkbox"/> Gender Team	<input checked="" type="checkbox"/>	
Meet with senior leadership to propose gender audit, get support and buy-in (see PowerPoint and handout explaining benefits of audit process)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> PowerPoint for senior leadership (Appendix B) <input checked="" type="checkbox"/> Handout (Appendix B)	
Distribute memo from senior leadership to all staff alerting them that the organization will be undertaking a Gender Audit. The memo should reference CEO support for the audit, include a short description of the audit process, and a statement informing staff that the Gender Officer will be leading the process with support from the Gender Team.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Memo from senior leadership to all staff	
Senior management should communicate in-person with staff at staff meetings and other in-person opportunities to convey the importance of the process.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Gender officer/representative from gender team sends note to staff who will participate alerting them of their role (those staff who are randomly selected) and provided with information about completing the survey, including due dates.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Memo to staff	
Ongoing communication with staff is important. We suggest using the gender newsletter, PowerPoint and other materials to continue communicating the results and process of the gender audit. Again, if in person communication is possible, that is recommended.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Gender Newsletter (Appendix H) <input checked="" type="checkbox"/> PowerPoint presentation templates (Appendix H)	

Appendix B

InterAction Gender Audit

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PowerPoint Presentation for Senior Leaders

<p style="text-align: center;">Gender Audit USAID/Bangladesh 2003</p>	<p style="text-align: center;">PURPOSE</p> <ul style="list-style-type: none">▪ Identify staff perceptions regarding gender in<ul style="list-style-type: none"><input checked="" type="checkbox"/> Programming<input checked="" type="checkbox"/> Administration - internal organization
<p style="text-align: center;">PURPOSE</p> <ul style="list-style-type: none">▪ Develop written gender action plan▪ Train staff in gender analysis▪ Gender in all phases of organization:<ul style="list-style-type: none">▪ HR▪ Job performance criteria▪ Recruitment and promotion	<p style="text-align: center;">OUTPUTS</p> <ul style="list-style-type: none">• Reflection of status of gender equity within organization• Baseline for collective discussion and analysis• Participatory process that builds organizational ownership for the agency's gender equity initiative

PROCESS

- Survey of all staff
- Focus Groups
- Presentation of results:
 - Management Team
 - Staff

RESULTS

- Creation of mission gender action plan
- TOT for gender team
- Training for SO teams/offices on gender equity, gender plans, gender indicators

Appendix B

InterAction Gender Audit

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Talking Points for Senior Leaders

GENDER AUDIT

USAID/Bangladesh gender team proposes conducting a gender audit for the mission.

GENDER AUDIT IS:

1. Step-by-step process of assessing the organization on gender equity
2. Steps include:
 - a) survey of all staff (questionnaire)
 - b) focus group conversations with staff to gain greater depth and specific recommendations
 - c) creation of a Gender Action Plan
3. Participation and engagement of staff at all stages of the process

OUTPUTS:

1. Reflection of the status of gender equity within the mission
2. Baseline for collective discussion and analysis
3. Participatory process that builds organizational ownership for the agency's gender equity initiative

RESULTS:

1. Recommendations to address gender equity in each area of the organization
2. Staff in all technical teams and departments possess increased gender knowledge and skills
3. Organizational Gender Action Plan created, including technical team and departmental action strategies

NEED FROM MANAGEMENT:

1. Brainstorm process for conducting audit – management team
2. Announce initial launch of gender audit – staff meetings, email
3. Help with regular updates about audit progress – staff meetings, email
4. Ongoing support to highlight and implement recommendations from audit – management team

QUESTIONS:

1. Timing
2. Resources
3. Other

ADVANTAGES – REASONS TO DO A GENDER AUDIT:

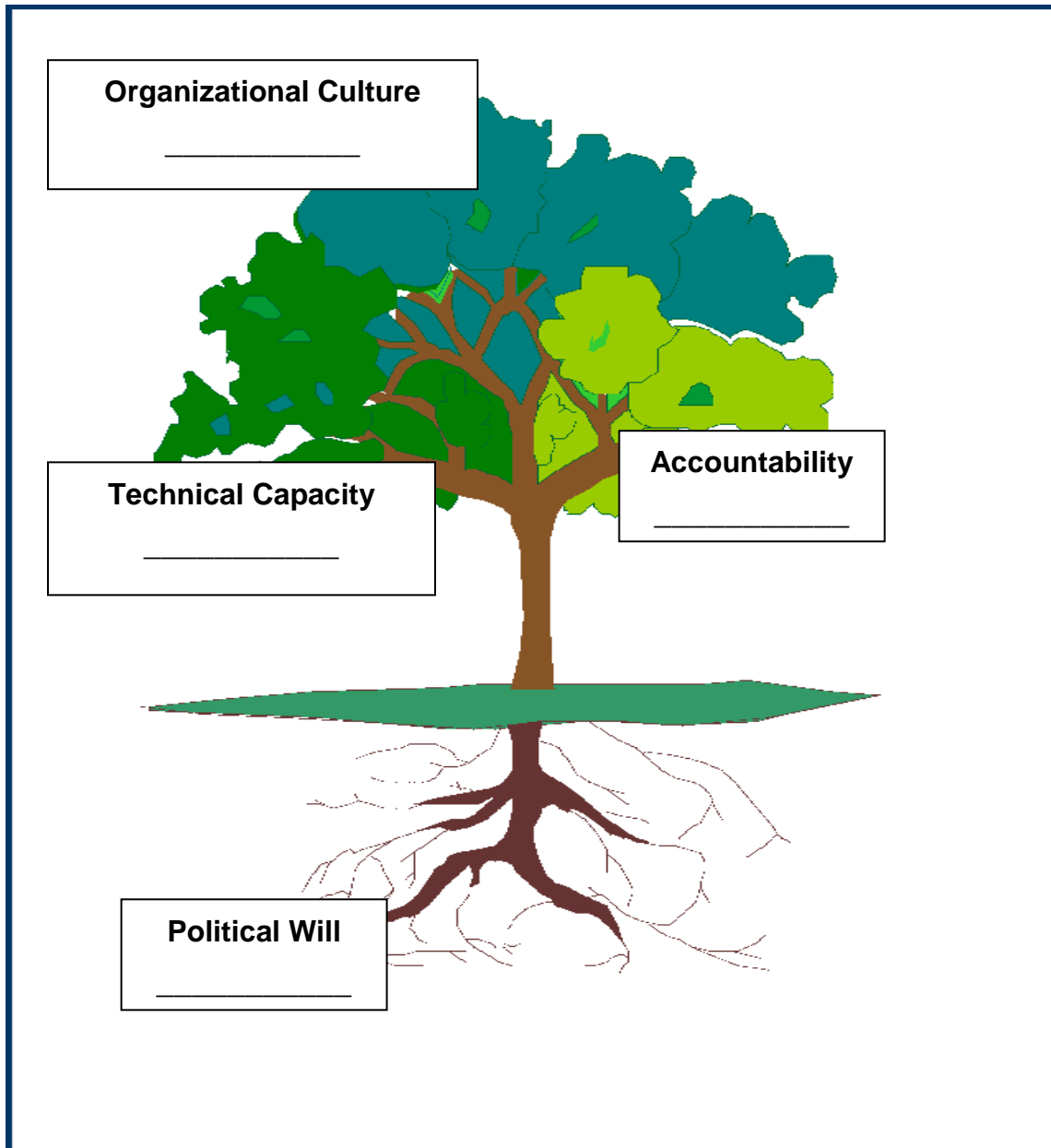
1. Become a leader in gender mainstreaming
2. Contributes to horizontal actions
3. Captures both programming and organizational issues
4. Leads to specific results for gender equity within the organization (in programs and internal operations)

Appendix C

InterAction Gender Audit

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GIF Tree with blanks



Gender Integration Framework ©

Framework developed by the Commission on the Advancement of Women. Copyright 1999. For more information, contact: InterAction - CAW, 1400 16th St, NW, Suite 201, Washington, DC 20036, Tel: 202.667.8227, Fax: 202.667.8236, Web: www.interaction.org

Appendix D

InterAction Gender Audit

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Long Questionnaire

Gender Audit Questionnaire

InterAction's Commission on the Advancement of Women is working with member organizations to help them develop a strategy to integrate gender more fully into its programming and organizational structure.

The Commission on the Advancement of Women was created in 1992 by InterAction's Executive Committee and provides services to promote gender equity in the policy and practice of InterAction member agencies. As part of your organization's plans to build on its successes to date and to address remaining challenges, InterAction's Commission on the Advancement of Women has been asked to conduct a "Gender Audit," a process in which all staff within the organization take stock of the current status of gender equity. While few organizations in the world can claim to have achieved gender equity, the purpose of a gender audit is to help identify areas of strength and achievements, innovative policies or practices, and continuing challenges as a basis for action planning.

The Gender Audit focuses on two dimensions, programming and organizational structure. The Commission has identified key indicators of progress towards achieving gender equity based on the experience of other members and on research on gender and organizational change.

Once you have completed and returned the audit, your responses will be tallied and analyzed. The results of the analysis will serve as the basis for a focus group process where a representative sample of individuals from your organization will meet to discuss the salient issues identified in the analysis of the audit responses. At the completion of the focus group process, the Commission will present recommendations to your organization's management team for consideration in your organization's strategic planning process.

The Gender Audit is divided into two sections. Each section has a number of sub-sections which focus more closely on a specific area within that section. The questions and statements you are being asked to respond to are preceded by a list of terms and an explanation of the response categories. Read the questions or statements in each section and check the response category that best describes your response to the question or statement. Your responses will be tallied with the responses of your fellow staff members. Your identity and responses will remain confidential.

DEFINITION OF TERMS

GENDER	The socially learned roles and responsibilities assigned to women and men in a given culture and the societal structures that support them.
GENDER EQUITY	The condition of fairness in relations between women and men, leading to a situation in which each has the equal status, rights, levels of responsibility, and access to power and resources.
GENDER SENSITIVE	Being aware of the differences between women's and men's needs, roles, responsibilities, and constraints.
GENDER ANALYSIS	An organized approach for considering gender issues in the entire process of program or organizational development. The purpose of gender analysis is to

ensure that development projects and programs fully incorporate the roles, needs, and participation of women and men. Gender analysis requires separating data and information by sex (known as disaggregated data) and understanding how labor, roles, needs and participation are divided and valued according to sex (whether one is a man or a woman). Gender analysis is done at all stages of development projects.

GENDER AUDIT OUTLINE

I. PROGRAMMING

- Program Design and Guidelines
- Program Implementation
- Technical Expertise
- Monitoring and Evaluation
- Partner Organizations

II. ORGANIZATION

- Gender Policies
- Staffing
- Human Resources
- Advocacy, Marketing and Communications
- Financial Resources
- Organizational Culture

EXPLANATION OF RESPONSE CATEGORIES

The Gender Audit is designed to solicit three types of information (1) to what extent?, (2) to what intensity?, and (3) to what frequency?

TO WHAT EXTENT?

Questions or statements designed to determine the extent of gender integration have the following response categories:

Not at all - there is no policy or system in place, little awareness by staff, no training available, no expressed commitment by leadership.

To a to a limited extent - there is a policy being developed or in place but not implemented, the system is somewhat effective, dialogue on values or norms has begun, minimal training provided, leadership supportive but not proactive.

To a to a moderate extent - there is a policy in place and usually implemented, the system is usually effective, values and norms commonly expressed, training available to some staff, and leadership is clearly supportive.

To a to a great extent - policy is fully in place and reliably implemented, the system is usually effective, values and norms are widely shared, training is widely implemented, and leadership is strongly and visibly committed.

To the to the fullest extent - a comprehensive policy is fully implemented and monitored, the system is very clear and effective, value and norms are widely shared and evident in actions, there are well-designed training programs regularly available for a large number of staff, and leadership champions the issue.

Do not know or DK- a lack of knowledge to respond to this question.

TO WHAT INTENSITY?

Questions or statements designed to determine the intensity of gender integration have the following response categories:

Strongly agree - very clear and strong support for the statement.

Agree - support for the statement.

No Opinion - neither support or lack of support for the statement.

Disagree - lack of support for the statement.

Strongly disagree - very clear and strong lack of support for the statement.

TO WHAT FREQUENCY?

Questions or statements designed to determine the frequency of gender integration have the following response categories:

Always - very consistent and regular practices, behaviors and implementation of policies.

Frequently - fairly reliable practices, behaviors and implementation of policies.

Occasionally - meaning irregular practices, behaviors and implementation of policies.

Seldom - infrequent, inconsistent practices, behaviors and implementation of policies.

Never - no practice, behaviors or implementation of policies.

Do not know or DK - a lack of knowledge to respond to this question.

Please check the response that most accurately describes your answer to the following questions and statements:

I. PROGRAMMING

[] to a moderate extent [] to a great extent

A. Program Planning and Design

[] to the fullest extent [] do not know

This section focuses on procedures and methods used to conceptualize and design development projects in the field.

1. Is the integration of gender equity in programs/projects mandated in your organization?

4. Are best practices in gender integration in programming incorporated in subsequent program/project design?

[] not at all [] to a limited extent

[] not at all [] to a limited extent

[] to a moderate extent [] to a great extent

[] to a moderate extent [] to a great extent

[] to the fullest extent [] do not know

[] to the fullest extent [] do not know

2. Are gender equity goals and objectives included in program/project designs?

5. Are gender questions or criterion included in your program/project proposal approval process?

[] not at all [] to a limited extent

[] not at all [] to a limited extent

[] to a moderate extent [] to a great extent

[] to a moderate extent [] to a great extent

[] to the fullest extent [] do not know

[] to the fullest extent [] do not know

3. For each program/project, is there a needs assessment, including an analysis of gender roles and responsibilities in the targeted community?

6. Does your organization use participatory methods to incorporate the views and preferences of both male and female community members in project design?

[] not at all [] to a limited extent

[] not at all [] to a limited extent

[] to a moderate extent [] to a great extent

[] to the fullest extent [] do not know

B. Program Implementation

This section focuses on how development projects actually operate in the field.

1. Does the implementation plan for your organization's programs/projects include activities that strengthen skills and provide women with equal access to services and training?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
2. Does the implementation plan for programs/projects include activities that strengthen skills and provide men with equal access to services and training?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
3. Do your project implementation strategies and plans take into account existing gender roles and interests of both male and female participants?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
4. Female beneficiaries of my organization's programs/projects value and see our programs/projects as beneficial to their lives.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree
5. Male beneficiaries of my organization's programs/projects value and see our programs/projects as beneficial to their lives.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree
6. My organization has developed the capacity to recognize and handle organizational resistance to addressing gender issues in our programs/projects.

- Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

C. Technical Expertise

This section focuses on the level of your organization's staff expertise in gender analysis and evaluation.

1. Is there a person or division responsible for gender in your organization?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
2. Is there assigned staff responsibility for gender integration in different departments?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
3. Does your organization consistently draw upon a person or division within the organization who is responsible for gender programming?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
4. Do staff have the necessary knowledge, skills and attitude to carry out their work with gender awareness?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
5. Have members of your organization received training in gender planning and analysis?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
6. Program/project planning, monitoring, evaluation and advisory teams in my

organization consist of members who are gender-sensitive and include at least one person with specific expertise and skills on gender issues.

- Always Frequently Occasionally
 Seldom Never

D. Monitoring and Evaluation

This section focuses on the extent to which gender disaggregated data and information is incorporated in the monitoring and evaluation of your organization's development projects and on program outcomes.

1. Is gender disaggregated data collected for projects and programs?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
2. Is the gender impact of projects and programs monitored and evaluated?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
3. Does your organization have sectoral specific indicators that include a gender dimension?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
4. Gender disaggregated data provides useful information for program/project evaluation and subsequent program/project design.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree
5. My organization's programs/projects contribute to the empowerment of women and the changing of unequal gender relations.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

6. My organization's programs/projects contribute to increased gender equity in the following areas:
material well being YES NO DK
access to resources YES NO DK
access to training YES NO DK
participation in
decision-making YES NO DK
self-respect/legal status YES NO DK
control over benefits YES NO DK
control over resources YES NO DK
participation in
the public sector YES NO DK

7. My organization's programs/projects collect gender disaggregated data in the following areas:
material well being YES NO DK
access to resources YES NO DK
access to training YES NO DK
participation in
decision-making YES NO DK
self-respect/legal status YES NO DK
control over benefits YES NO DK
control over resources YES NO DK
participation in
the public sector YES NO DK
beneficiaries view of the
project's benefit to their
lives YES NO DK

E. Partner Organizations

This section focuses on the level of gender integration in your organization's relations with partner or local NGO affiliates.

1. Is commitment to gender equity a criterion in your organization's selection of partner or local NGO affiliates?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
2. Is a gender policy included in the written agreements outlining your organization's relationship with partner or local NGO affiliates?
 not at all to a limited extent

- to a moderate extent to a great extent
 to the fullest extent do not know
3. Does your organization provide training and tools on gender planning, analysis and evaluation to partner or local NGO affiliate staff?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
4. What are some of the obstacles to incorporating gender analysis in program/project planning, implementation and evaluation in your organization? Please check all that apply.
 organization size
 level of staffing
 office culture/environment
 national culture
 lack of financial resources for gender programming
 lack of staff training on gender
 lack of gender analysis tools
 lack of support from senior management
 low organizational priority for gender issues
 other, please specify below:

II. ORGANIZATION

Experience shows that there are usually underlying reasons outside of the strictly programmatic realm which affect the dynamic of programming. Please take a moment to reflect on the following areas.

A. Gender Policy

This section focuses on the nature and quality of your organization's gender policy.

1. Does your organization have a written gender policy that affirms a commitment to gender equity?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

2. Does your gender policy have an operational plan that includes clear allocation of responsibilities and time for monitoring and evaluation?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
3. Is gender taken into account during strategic planning for organizational activities?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
4. Everyone in the organization feels ownership over the gender policy.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree NA
5. Management takes responsibility for the development and implementation of the gender policy.
 Always Frequently Occasionally
 Seldom Never NA

B. Staffing

This section focuses on the gender composition of staff in your organization.

1. At headquarters, has there been an increase in the representation of women in senior management positions in the past few years?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
2. In the field, has there been an increase in the representation of women in senior management positions in the past few years?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

3. Has there been an increase in the representation of women on your organization's board in the past few years?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
4. Are there proactive strategies implemented to recruit or promote women into senior management positions?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
5. Does management show respect for diversity in work and management styles in your organization?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

C. Human Resources

This section focuses on human resource policies and the level and extent of gender considerations in hiring and personnel assessments.

1. Is there a written equal opportunity policy?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
2. Are there flexible work arrangements in your organization?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
3. Is there a maternity and paternity leave policy?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

4. Is there a child care and dependent care leave policy?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
5. Is gender awareness included in all job descriptions?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
6. Is gender awareness included in job performance criteria?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
7. Is there training of staff in gender awareness and sensitization?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
8. Is there training of senior management and members of boards in institutionalizing the integration of gender into the management of the organization?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know
9. My organization promotes teamwork, involving both men and women as equal partners.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree
10. Management is committed to promoting female representation at senior levels of my organization, including the Board.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

11. There has been a gradual increase of gender expertise among staff members in my organization.

Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

12. Good performance in the field of gender is rewarded in my organization.

Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

D. Advocacy, Marketing & Communications

This section focuses on the quality and gender sensitivity your organization's communication and advocacy campaigns.

1. Are advocacy and marketing campaigns and initiatives planned and informed by a gender perspective?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

2. Are your advocacy and marketing policies and plans influenced and advised by women's organizations, networks and gender experts?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

3. Is gender incorporated in your organization's communications, fund-raising and media strategies?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

4. Is a gender perspective reflected in your publications, for example books, brochures, newsletters?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

E. Financial Resources

This section focuses on the level of the organization's resources budgeted for gender equity.

1. Has your organization budgeted adequate financial resources to support its gender integration work?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

2. Are financial resources allocated for the operationalization of the gender policy at all levels?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

3. Is staff training in gender issues systematically budgeted for in your organization?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

F. Organizational Culture

This section focuses on the level of gender sensitivity in the culture of your organization.

1. Does the organization encourage gender sensitive behavior, for example in terms of language used, jokes and comments made?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

2. Does the organization reinforce gender sensitive behavior and procedures to prevent and address sexual harassment?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

3. Is staff in your organization committed to the implementation of a gender policy?

not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

4. Are gender issues taken seriously and discussed openly by men and women in your organization?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

5. Is gender stereotyping (e.g. “those gender blind men”, or “those feminists,”) addressed and countered by individual staff members in your organization?
 not at all to a limited extent
 to a moderate extent to a great extent
 to the fullest extent do not know

6. There is a gap between how men and women in my organization view gender issues.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

7. The staff in my organization are enthusiastic about the gender work they do.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

8. Staff in my organization think that the promotion of gender equity fits into the image of our organization.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

9. Women in my organization think that the organization is woman friendly.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

10. Men in my organization think that the organization is woman friendly.
 Strongly Agree Agree No Opinion

Disagree Strongly Disagree

11. My organization has a reputation of integrity and competence on gender issues amongst leaders in the field of gender and development.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

12. My organization could do much more than it is currently doing to institutionalize gender equity.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

13. The culture of my organization places a higher value on the ways males tend to work and less value on the ways females tend to work.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

14. Meetings in my organization tend to be dominated by male staff.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

15. The working environment in my organization has improved for women over the past two years.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

16. It is unfair to promote women more than men in my organization’s field programs/projects.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

17. In my organization, males have a much easier time establishing personal and professional networks within the organization than do females.
 Strongly Agree Agree No Opinion
 Disagree Strongly Disagree

18. In your organization, what are three characteristics of an ideal worker?

19. What do you think your organization should do to take action on gender integration?

20. Please describe any successes or challenges you have experienced in integrating gender in programming or other aspects of work in your organization. This information will be used in follow-up research and in the targeting of support.

About You

This section focuses on the basic demographics information of the audit's respondents.

1. Are you male or female?

male female

2. What is your position in your organization?

senior management team

program staff

administrative staff

support staff

3. Where is your base of work located?

at headquarters

at a field office

4. What is your age?

Appendix E

InterAction Gender Audit

A Tool for Organizational Transformation ©

Long Questionnaire Codebook

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
PROGRAMMING			
A. Program Planning & Design			
	MANDATE	1. Is the integration of gender equality in programs/projects mandated in your organization?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	GOALS	2. Are gender equality goals and objectives included in program/project design?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	NEEDS	3. For each program/project, is there a needs assessment, including an analysis of gender roles and responsibilities in the targeted community?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	BEST	4. Are best practices in gender integration in programming incorporated in subsequent program/project design?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	CRITERIA	5. Are gender questions or criterion included in your program/project proposal approval process?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	METHODS	6. Does your organization use participatory methods to incorporate the views and preferences of both male and female community members in project design.	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
B. Program Implementation			
	ACCESS1	1. Does the implementation plan for programs/projects include activities that strengthen skills and provide women/girls with equal access to services and training?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	ACCESS2	2. Does the implementation plan for programs/projects include activities that strengthen skills and provide men/boys	[1] not at all [2] to a limited extent [3] to a moderate extent

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
		with equal access to services and training?	[4] to a great extent [5] to the fullest extent [7] do not know
	ACCESS3	3. Do your project implementation strategies and plans take into account existing gender roles and interests of both male and female participants?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	VALUE1	4. Female beneficiaries of my organization's programs/projects value and see our programs/projects as beneficial to their lives.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	VALUE2	5. Male beneficiaries of my organization's programs/projects value and see our programs/projects as beneficial to their lives.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	CAPACITY	6. My organization has developed the capacity to recognize and handle resistance to addressing gender issues in our programs/projects.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
		7. What are some of the obstacles to incorporating gender analysis in program/project planning, implementation and evaluation in the national office? Please check all that apply.	
	OBSTACLE1	organization size	[2] yes [1] no
	OBSTACLE2	level of staffing	[2] yes [1] no
	OBSTACLE3	office culture/environment	[2] yes [1] no
	OBSTACLE4	national culture	[2] yes [1] no
	OBSTACLE5	lack of financial resources for gender programming	[2] yes [1] no
	OBSTACLE6	lack of staff training on gender	[2] yes [1] no
	OBSTACLE7	lack of gender analysis tools	[2] yes [1] no
	OBSTACLE8	lack of support from senior management	[2] yes [1] no
	OBSTACLE9	low organizational priority for gender issues	[2] yes [1] no
	OBSTACLE10	other	TEXT
C. Technical Expertise			
	DIVISION	1. Is there a person or department responsible for gender in your organization?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	STAFF1	2. Is there assigned staff responsibility for gender integration in different departments?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	STAFF2	3. Does your organization consistently draw upon a person or division within the organization who is responsible for gender programming?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
	SKILLS	4. Does staff have the necessary knowledge, skills and attitude to carry out their work with gender awareness?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	TRAIN	5. Is there training of project and program staff in gender planning and analysis?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	EXPERT1	6. Program/project planning, monitoring, evaluation and advisory teams in my organization consist of members who are gender-sensitive.	[5] always [4] frequently [3] occasionally [2] seldom [1] never
	EXPERT2	7. Program/project planning, monitoring, evaluation and advisory teams in my organization include at least one person with specific expertise and skills on gender issues.	[5] always [4] frequently [3] occasionally [2] seldom [1] never
D. Monitoring & Evaluation			
	DATA	1. Is gender disaggregated data collected for projects and programs?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	IMPACT	2. Is the gender impact of projects and programs monitored and evaluated?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	SECTOR	3. Does your organization have sector specific indicators that include a gender dimension?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	DESIGN	4. Gender disaggregated data provides useful information for program/project evaluation and subsequent program/project design.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	POWER	5. My organization's programs/projects contribute to the empowerment of women/girls and the changing of unequal gender relations.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
		6. My organization's programs/projects contribute to increased gender equality in the following areas:	
	EQUALITY1	material well being	[2] yes [1] no [7] DK
	EQUALITY2	access to resources	[2] yes [1] no [7] DK
	EQUALITY3	access to training	[2] yes [1] no [7] DK

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
	EQUALITY4	participation in decision-making	[2] yes [1] no [7] DK
	EQUALITY5	self-respect/legal status	[2] yes [1] no [7] DK
	EQUALITY6	control over benefits	[2] yes [1] no [7] DK
	EQUALITY7	control over resources	[2] yes [1] no [7] DK
	EQUALITY8	participation in the public sector	[2] yes [1] no [7] DK
		7. My organization's programs/projects collect gender disaggregated data in the following areas:	
	DATA9	material well being	[2] yes [1] no [7] DK
	DATA10	access to resources	[2] yes [1] no [7] DK
	DATA11	access to training	[2] yes [1] no [7] DK
	DATA12	participation in decision-making	[2] yes [1] no [7] DK
	DATA13	self-respect/legal status	[2] yes [1] no [7] DK
	DATA14	control over benefits	[2] yes [1] no [7] DK
	DATA15	control over resources	[2] yes [1] no [7] DK
	DATA16	participation in the public sector	[2] yes [1] no [7] DK
	DATA17	beneficiaries view of the project's benefit to their lives	[2] yes [1] no [7] DK
E. Partner Organizations			
	PARTNER	1. Is commitment to gender equality a criteria in your organization's selection of partner or local NGO affiliates?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	LOCAL	2. Is a gender policy included in the written agreements outlining your organization's relationship with partner or local NGO affiliates?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	TOOLS	3. Does your organization provide training and tools on gender planning, analysis and evaluation to partner or local NGO affiliate staff?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
ORGANIZATION			
A. Gender Policy			
	POLICY	1. Does your organization have a written gender policy that affirms a commitment to gender equality?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	PLAN	2. Does your organization's gender policy have an operational plan that includes clear allocation of responsibilities and time for monitoring and evaluation?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	STRATEGY	3. Is gender equality taken into account during strategic planning for your organization's activities?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	OWN	4. Everyone in my organization feels ownership over the gender policy.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree [7] NA
	MANAGE	5. Management takes responsibility for the development and implementation of the gender policy.	[5] always [4] frequently [3] occasionally [2] seldom [1] never [7] NA
B. Staffing			
	SENIOR1	1. At the headquarters, has there been an increase in the representation of women in senior management positions in the past few years?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	SENIOR2	2. At the headquarters, has there been an increase in the representation of men in senior management positions in the past few years?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	FIELD1	3. In the field, has there been an increase in the representation of women in senior management positions in the past few years?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	FIELD2	4. In the field, has there been an increase in the representation of men in senior management positions in the past few years?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	BOARD	5. Has there been an increase in the representation of women on your organization's board in the past few years?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
	RECRUIT1	6. Are there proactive strategies implemented to recruit or promote women into senior management positions?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	RECRUIT2	7. Are there proactive strategies implemented to recruit or promote men into senior management positions?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	DIVERSE	8. Does management show respect for diversity in work and management styles in your organization?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
C. Human Resources			
	WRITE	1. Is there a written equal opportunity policy?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	FLEX1	2. Are there flexible work arrangements in the national office?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	FLEX2	3. Is staff encouraged to take advantage of flexible work arrangements?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	LEAVE1	4. Is there a maternity leave policy?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent
	LEAVE2	5. Is there a paternity leave policy?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent
	LEAVE3	6. Is staff encouraged to take advantage of maternity leave?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent
	LEAVE4	7. Is staff encouraged to take advantage of paternity leave?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent
	CHILD	8. Is there a child care and dependent care leave policy?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	JOB1	9. Is gender awareness included in all job descriptions?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
			[5] to the fullest extent [7] do not know
	JOB2	10. Is gender awareness included in job performance criteria?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	AWARE	11. Is there training of staff in gender awareness and sensitization?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	INSTITUTE	12. Is there training of senior management and members of boards in institutionalizing the integration of gender equality into the management of the organization?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	TEAM	13. My organization promotes teamwork, involving both men and women as equal partners.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	PROMOTE	14. Management is committed to promoting female representation at senior levels of my organization, including the Board.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	INCREASE	15. There has been a gradual increase of gender expertise among staff members in my organization.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	REWARD	16. Good performance in the field of gender equality is rewarded in my organization.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
D. Advocacy, Public Relations & Communications			
	ADVOCACY1	1. Are advocacy campaigns and initiatives planned and informed by a gender equality perspective?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	ADVOCACY2	2. Are public relations campaigns and initiatives planned and informed by a gender equality perspective?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	ADVICE1	3. Are your advocacy policies and plans influenced and advised by women's organizations, networks and gender experts?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	ADVICE2	4. Are your public relations policies and plans influenced and advised by women's organizations, networks and gender experts?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
	MEDIA	5. Is gender equality incorporated in your organization's communications, fundraising and media strategies?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	PR	6. Is a gender perspective reflected in your publications, for example books, brochures, newsletters?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
E. Financial Resources			
	BUDGET1	1. Has your organization budgeted adequate financial resources to support its gender integration work?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	BUDGET2	2. Are financial resources allocated for the implementation of the gender policy at all levels?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	BUDGET3	3. Is staff training on gender equality issues and gender analysis systematically budgeted for in your organization?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
F. Organizational Culture			
	COMMENT	1. Does your organization encourage gender sensitive behavior, for example in terms of language used, jokes and comments made?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	HARASS	2. Does your organization reinforce gender sensitive behavior and procedures to prevent and address sexual harassment?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	COMMIT	3. Is staff in your organization committed to the implementation of a gender policy?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	DISCUSS	4. Are gender issues taken seriously and discussed openly by men and women in your organization?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	STEREO	5. Is gender stereotyping (e.g. "those gender blind men" or "those feminists") addressed and countered by individual staff members in your organization?	[1] not at all [2] to a limited extent [3] to a moderate extent [4] to a great extent [5] to the fullest extent [7] do not know
	GAP	6. There is a gap between how men and women in my organization view gender	[1] strongly agree [2] agree [3] no opinion

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
		issues.	[4] disagree [5] strongly disagree
	WORK	7. The staff in my organization is enthusiastic about the gender work they do.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	IMAGE	8. Staff in my organization thinks that the promotion of gender equality fits into the image of our organization.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	THINK1	9. Women in my organization think that the organization is woman friendly.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	THINK2	10. Men in my organization think that the organization is woman friendly.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	INTEGRITY	11. My organization has a reputation of integrity and competence on gender issues amongst leaders in the field of gender and development.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	MORE	12. My organization could do much more than it is currently doing to institutionalize gender equality.	[1] strongly agree [2] agree [3] no opinion [4] disagree [5] strongly disagree
	CULTURE	13. The culture of my organization places a higher value on the ways males tend to work and less value on the ways females tend to work.	[1] strongly agree [2] agree [3] no opinion [4] disagree [5] strongly disagree
	MEETINGS	14. Meetings in the my organization tend to be dominated by male staff.	[1] strongly agree [2] agree [3] no opinion [4] disagree [5] strongly disagree
	PAST	15. The working environment in my organization has improved for women over the past two years.	[5] strongly agree [4] agree [3] no opinion [2] disagree [1] strongly disagree
	UNFAIR1	16. It is unfair to promote women/girls more than men/boys in my organization's field programs/projects.	[1] strongly agree [2] agree [3] no opinion [4] disagree [5] strongly disagree
	UNFAIR2	17. It is unfair to promote men/boys more than women/girls my organization's field programs/projects.	[1] strongly agree [2] agree [3] no opinion [4] disagree [5] strongly disagree
	NETWORKS	18. In my organization, males have a much easier time establishing personal and professional networks within the organization than do females.	[1] strongly agree [2] agree [3] no opinion [4] disagree [5] strongly disagree
	THREE	19. In your organization, what are three characteristics of an ideal worker?	TEXT

GENDER AUDIT SECTION	FIELD (VARIABLE) NAME	QUESTION	RESPONSE CATEGORIES AND CODES
	ACTION	20. What do you think your organization should do to mainstream gender equality?	TEXT
	EXAMPLES	21. Please describe any of the successes or challenges you have experienced in integrating gender in programming or other aspects of work in your organization.	TEXT
DEMOGRAPHICS			
	SEX	1. Are you male or female?	[1] male [2] female
	POSITION	2. What is your position in your organization?	[8] director [7] associate director [6] coordinator [5] manager [4] associate [3] officers [2] assistant [1] support
	BASE	3. Where is your base of work located?	[1] at headquarters [2] in the field
	AGE	4. What is your age?	NUMBER

Appendix F

InterAction Gender Audit

A Tool for Organizational Transformation ©

Short Questionnaire

InterAction Gender Audit Questionnaire – short version

The checklist below is a quick and effective way to assess the extent to which an organization embraces gender equality in its programs and operations. Read through the list and think about your organization. For each of the 20 statements, identify the degree to which these elements are present in the organization by ranking from 1 (a very small degree) to 5 (a great degree). The *Gender Integration Framework*© developed by InterAction's Commission on the Advancement of Women will be used to score your responses. Based on these scores, you can discuss and begin to develop strategies for moving organizations toward gender equality.

Use the following scale to rate each of the statements below

1	2	3	4	5
<i>To a very small degree</i>		<i>To a moderate degree</i>		<i>To a very great degree</i>

- _____ 1. The integration of gender equality in programs/projects is mandated in my organization.
- _____ 2. My organization has a written policy that affirms a commitment to gender equality.
- _____ 3. Senior management actively support and take responsibility for the implementation of the policy (or for promoting gender equality, if no policy exists).
- _____ 4. There has been an increase in the representation of women in senior management positions in the past few years.
- _____ 5. My organization has budgeted adequate financial resources to support our gender integration work.
- _____ 6. There is a person or division responsible for gender in my organization.
- _____ 7. Staff has the necessary knowledge, skills and attitude to carry out their work with gender awareness.

Use the following scale to rate each of the statements below

1	2	3	4	5
<i>To a very small degree</i>		<i>To a moderate degree</i>		<i>To a very great degree</i>

- _____ 8. Program/project planning, implementation, evaluation, and advisory teams in my organization consist of members who are gender-sensitive.
- _____ 9. Program/project planning, implementation, evaluation, and advisory teams in my organization include at least one person with specific expertise and skills in gender issues.
- _____ 10. Gender analysis is built into our program planning and implementation procedures.
- _____ 11. Gender analysis is built into our program evaluation procedures.
- _____ 12. Data collected for projects and programs is disaggregated by sex.
- _____ 13. The gender impact of projects and programs is monitored and evaluated.
- _____ 14. My organization's programs/projects contribute to the empowerment of women/girls and the changing of unequal gender relations.
- _____ 15. Gender awareness is included in job descriptions and/or in job performance criteria.
- _____ 16. Gender issues are taken seriously and discussed openly by men and women in my organization.
- _____ 17. My organization has a reputation of integrity and competence on gender issues amongst leaders in the field of gender and development.
- _____ 18. The working environment in my organization has improved for women over the past two years.
- _____ 19. Staff in my organization is committed to the advancement of gender equality.
- _____ 20. My organization has made significant progress in mainstreaming gender into our operations and programs.
- _____ 21. What do you think your organization should do to mainstream gender equality? (*Write in response*)

_____ 22. Please describe any successes or challenges you have experienced in integrating gender in programming or other aspects of work in your organization. *(Write in response)*

23. Some information about you (check the box that best applies to you):

- Male Female
- What is the best description of your position within your organization: Technical/program
 Administrative/support Management/senior leadership Contracts/finance
- How many years have you worked at your organization? Write in # _____
- Where is your base of work: Field office Headquarters office
- What is your age? Write in number _____

Appendix G

InterAction Gender Audit

A Tool for Organizational Transformation ©

Short Questionnaire Analysis Sample

Excel Spreadsheet

Data Entry Date:

1/6/2010

Survey #	Q 1	Q 2	Q 3	Q 4	Q 5	Q 6	Q 7	Q 8	Q 9	Q 10	Q 11	Q 12	Q 13	Q 14	Q 15	Q 16	Q 17	Q 18	Q 19	Q 20	22	23
1	5	5	3	5	3	5	3	3	5	1	3	3	3	3	5	5	1	3	5			
2	4	4	4	4	3	3	2	4	1	4	3	3	3	5	2	3		3	4	3		
3	5	5	5	5	3	5	3	4	3	3	3	5	3	4	3	4	3	4	4	4		
4	2	1	2	3	1	1	3	4	2	3	3		2	4	1	2	1	3	3	1		
5	2	5	3		2	2	3	4	3	2	2	1	3	5	4	3	5		5	3		
6	3	5	4	4	2	4	3	2	2	3	3	4	2	2	3	3	2	3	3	3		
7	5	5	5	5	4	5	4	5	5	4	4	5	4	5	4	3	3	5	5	5		
8	3	5	3		4	5	4	3	3	2	2	5	3	5	1	1	4		4	2		
9	1	1	2	4	1	1	3	3	2	1	1	1	1	5	1	2	3	3	3	2		
10	4	3	4	3	1	1	2	4	2	4	5	5	1	4	1	3	2	2	5	4		
11	3	3	1	1	1	1	2	2	1	1	1	4	1	3	1	2	1	1	2	1		
12	2	3	1	1	1	1	3	3	2	1	2	2	2	4	1	1	2	1	2	1		
13	2	3	3	4	2	1	2	4	1	2	3	4	2	4	2	3	3	3	3	3		
14	3	1	1	3	1	1	1	3	1	2	2	4	1	4	1	2	2		3	2		
15	3	3	1	2	1	1	3	3	2	1	2	5	4	4	1	1	2	3	3	2		
16	2	4	3	1	1	2	2	3	1	1	1	1	1	2	1	4	2	3	4	2		
17	3	2	3	2	2	3	3	4	4	4	4	4	4	3	2	3	3	2	3	3		
18	2	2	2	1	1	3	1	3	4	2	3	4	2	4	1	2	1		2	2		
19	2	3	3	4	2	1	3	3	1	2	2	2	2	4	2	3	1	3	4	3		
20	1	5	3	2	1	1	1	2	2	1	1	4	2	4	1	2	3	2	2	2		
Total	5	6	5	5	3	4	5	6	4	4	5	6	4	7	3	5	4	4	6	5	10	
	7	8	6	4	7	7	1	6	7	4	0	6	6	8	6	2	8	2	7	3	65	
Avg		3				2	2								3		2	2	3			
	2.	.	2.		1.	.	.	3.	2.	2.	2.	3.			.	1.	2.	.	.	.		
	9	4	8	3	9	4	6	3	4	2	5	5		2.3	9	8	6	5	6	4	2.7	
	Political Will				Technical Capacity				Accountability				Org'al Culture									
	3.2				2.8				3.9				3.1									

Analysis Steps:

1. Enter the Survey # and responses for each question across the spreadsheet from left to right. Repeat for all questions.
2. Total Question #1 responses. Divide by the number of responses received for that question. This gives you the average. Repeat for each question.
3. Sum Political Will averages (Questions 1-5) and divide by 5 (# of questions in this dimension) to get your organization's score for Political Will.
4. Repeat the same steps for Technical Capacity (divide by 6), Accountability (divide by 4), and Organizational Culture (divide by 5).
5. Transfer these results to the Survey Report form

Appendix G

InterAction Gender Audit

A Tool for Organizational Transformation ©

Short Questionnaire Scoring Worksheet

If you build your own short questionnaire, you need to alter the scoring sheet below to reflect the number of questions in each GIF dimension: political will, technical capacity, accountability, and organizational culture.

1. Political Will

Add total for questions # 1-5: _____

Divide by 5: _____

Put this number on the tree “PW” line

2. Technical Capacity

Add total for questions # 6-11: _____

Divide by 6: _____

Put this number on the tree “TC” line

3. Accountability

Add total for questions # 12-15: _____

Divide by 4: _____

Put this number on the tree “A” line

4. Organizational Culture

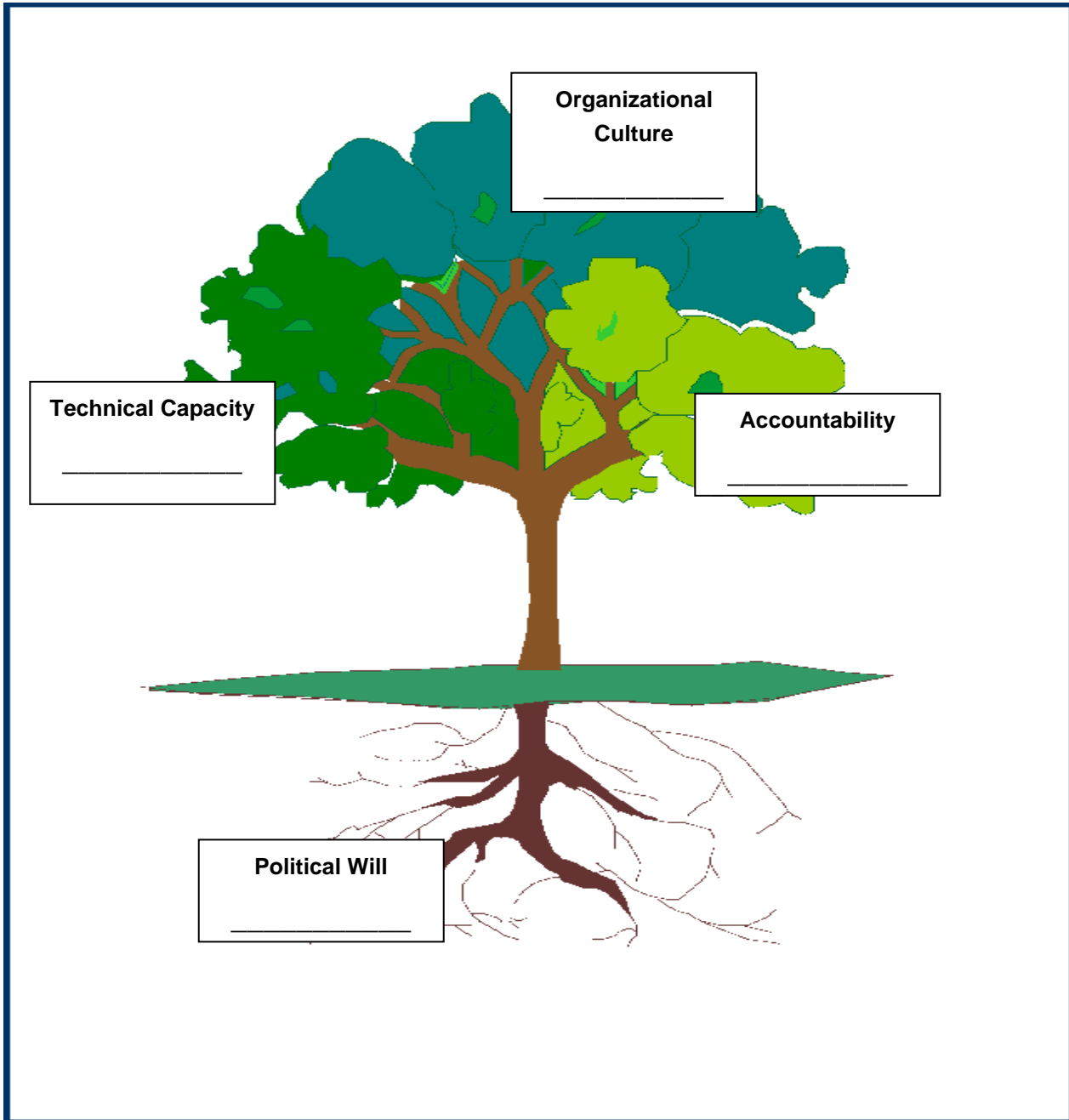
Add total for questions # 16-20: _____

Divide by 5: _____

Put this number on the tree “OC” line

Gender Integration Framework ©

Insert your scores in the correct box below



Framework developed by the Commission on the Advancement of Women. Copyright 1999. For more information, contact: InterAction - CAW, 1400 16th St, NW, Suite 201, Washington, DC 20036, Tel: 202.667.8227, Fax: 202.667.8236, Web: www.interaction.org

Appendix G

InterAction Gender Audit

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Short Questionnaire Report Sample

Organization Name: _____

N= (total # of completed surveys) 20

Date of Survey: June 10, 2009

Scores:

Gender Integration Framework Dimension	Score
Political Will	3.2
Technical Capacity	2.8
Accountability	3.9
Organizational Culture	3.1

Discussion

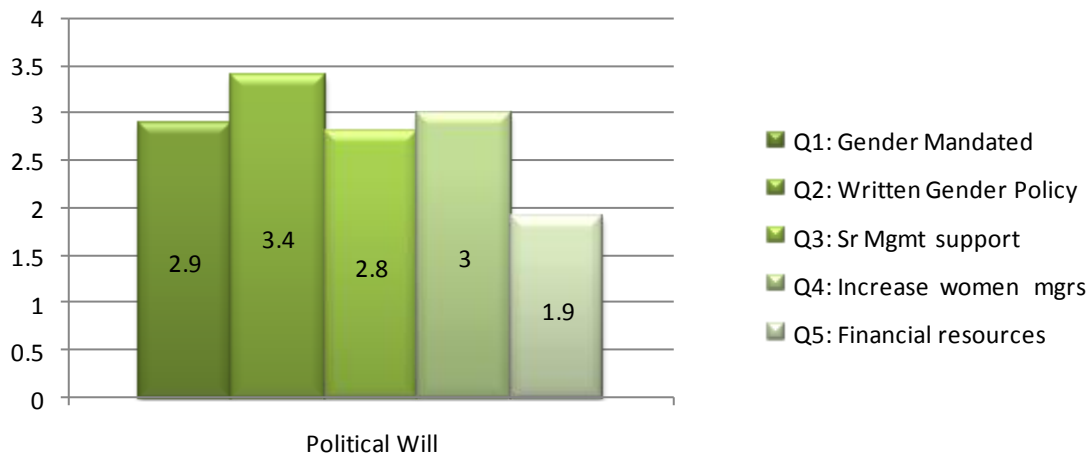
Using a 1-5 range scale, a 1 would indicate a very low score in that dimension, whereas a 5 would indicate a very high and favorable score in a given dimension. The point scores above indicate that staff believe the organization has accountability mechanisms in place for gender integration and that staff generally are held accountable. On the other hand, staff view themselves and others as possessing less technical capacity for gender integration. Political will is viewed as neither high nor low which could indicate ambiguous or uncertain support. It could also indicate that staff believe political will exists to move gender integration forward. Organizational culture is relatively neutral regarding gender issues. These are results you can explore further during the focus group conversations.

Political Will:

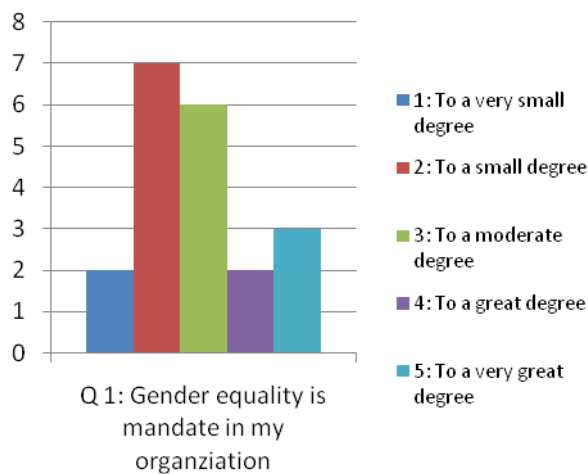
- Scores ranged between: 1.9 (low) to 3.4 (high)
- The lowest score related to: budget: "My organization has not budgeted adequate financial resources to support our gender integration work." (1.9)
- The highest score for political will related to: having an organizational gender policy: "My organization has a written policy that affirms a commitment to gender equality." (3.4)

Repeat the above section for each of the other three dimensions using the short questionnaire results. You can also highlight differences among groups based on the demographics you used in your questionnaire.

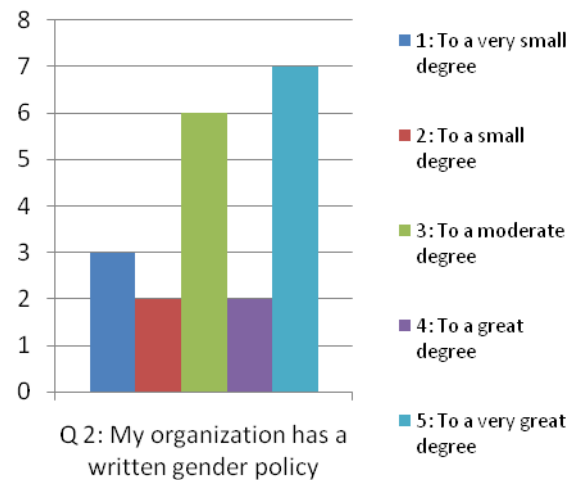
Political Will



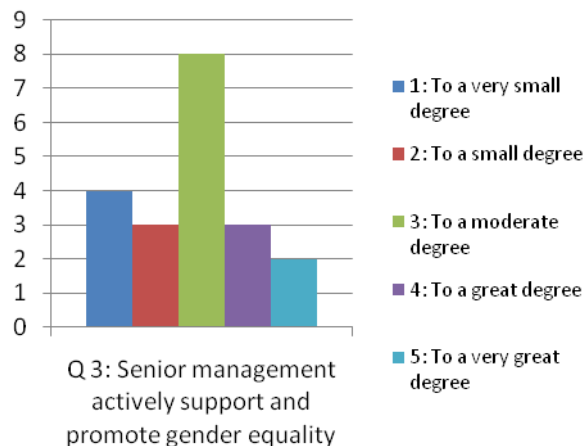
Question 1



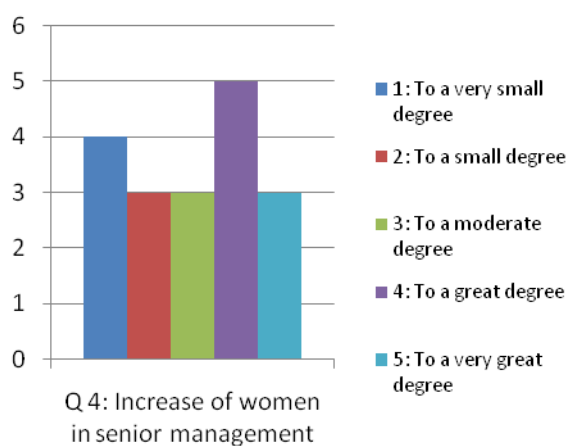
Question 2

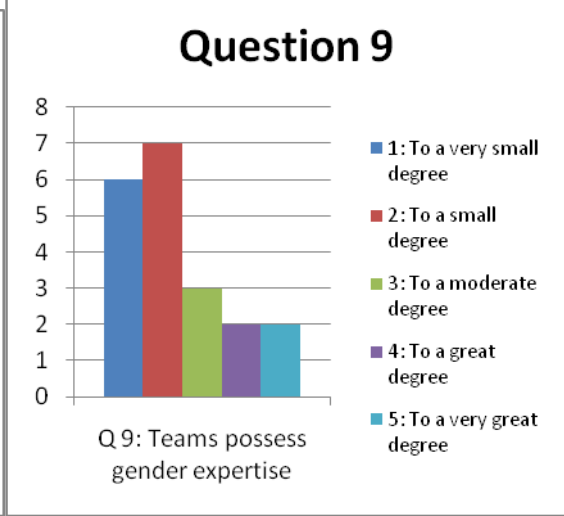
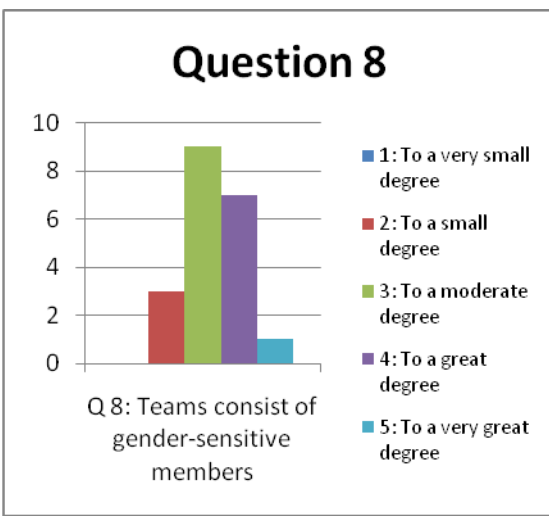
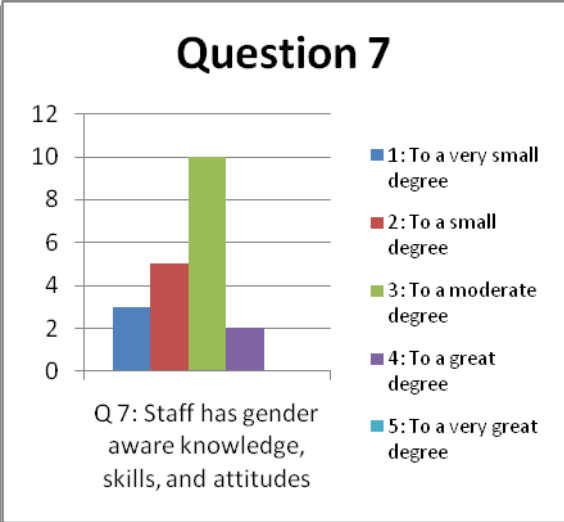
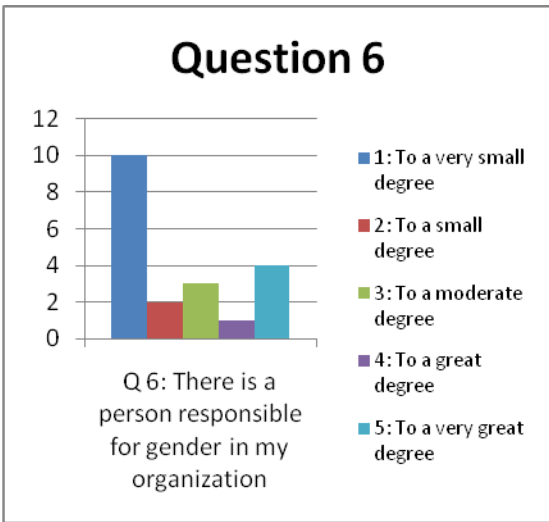
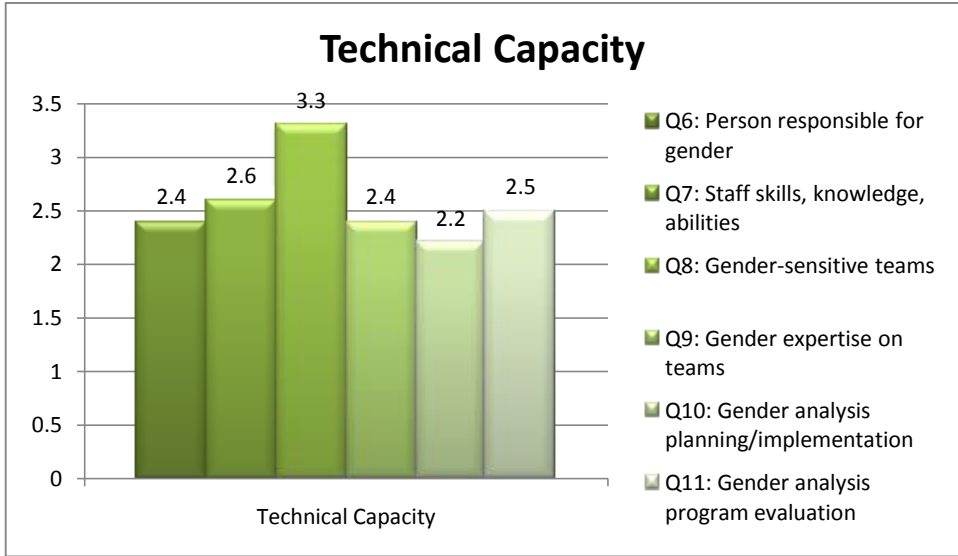


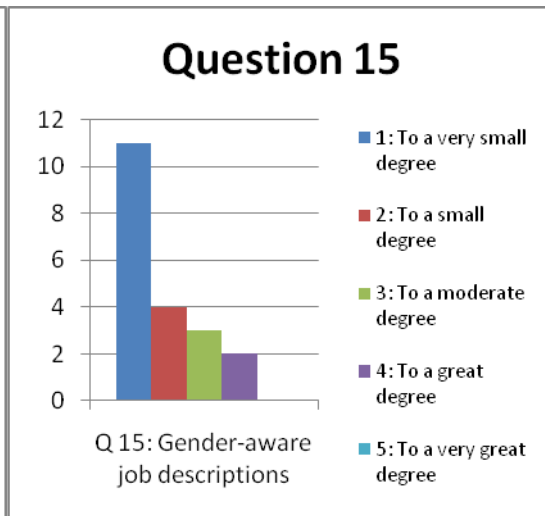
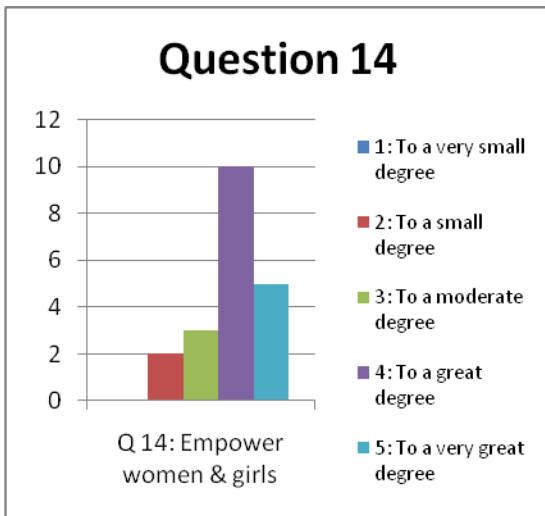
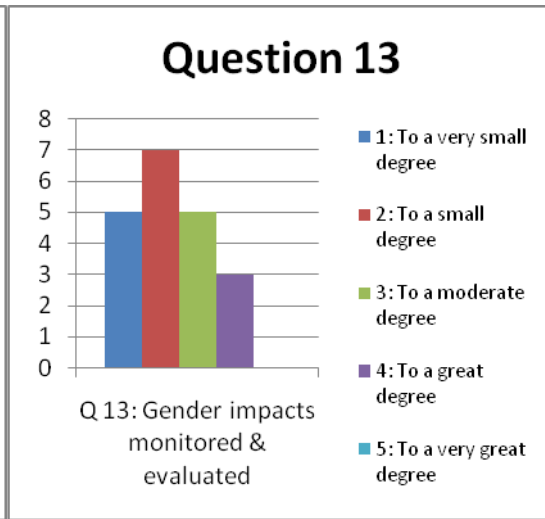
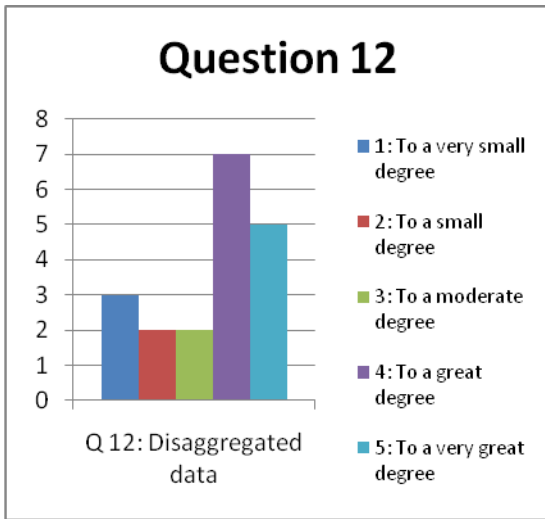
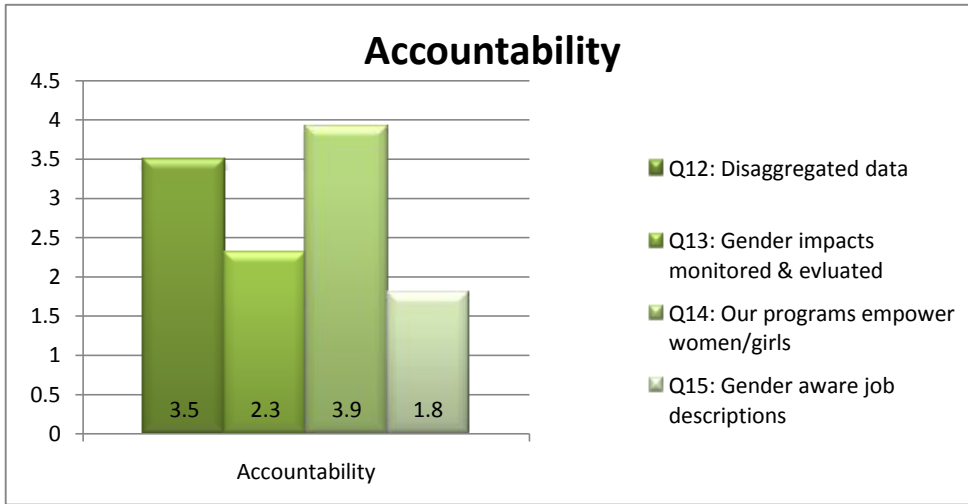
Question 3

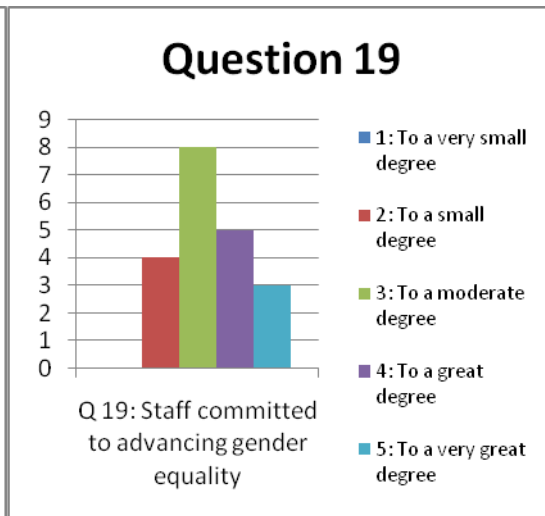
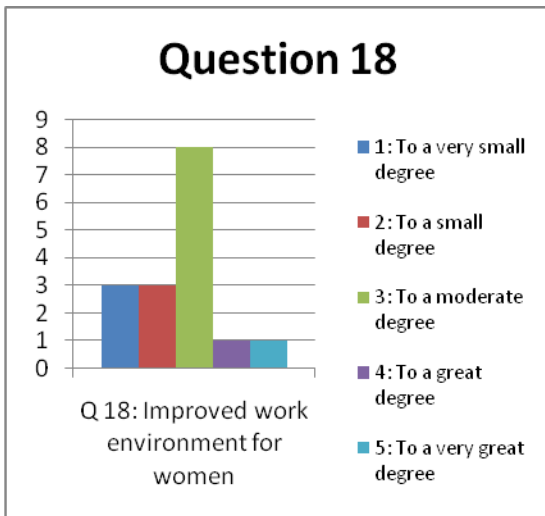
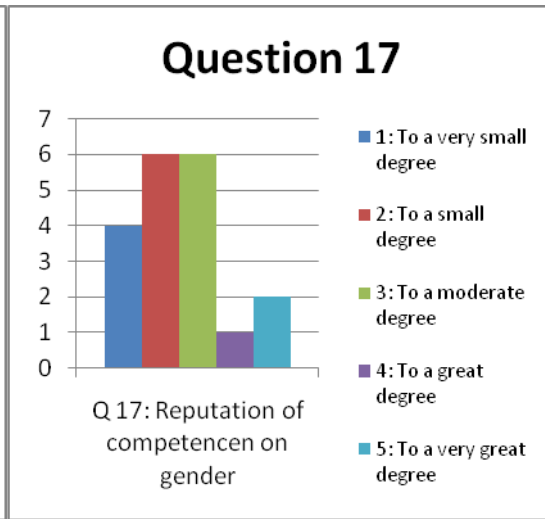
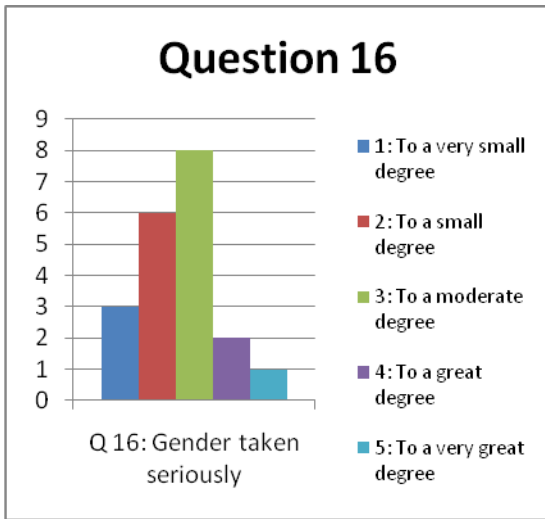
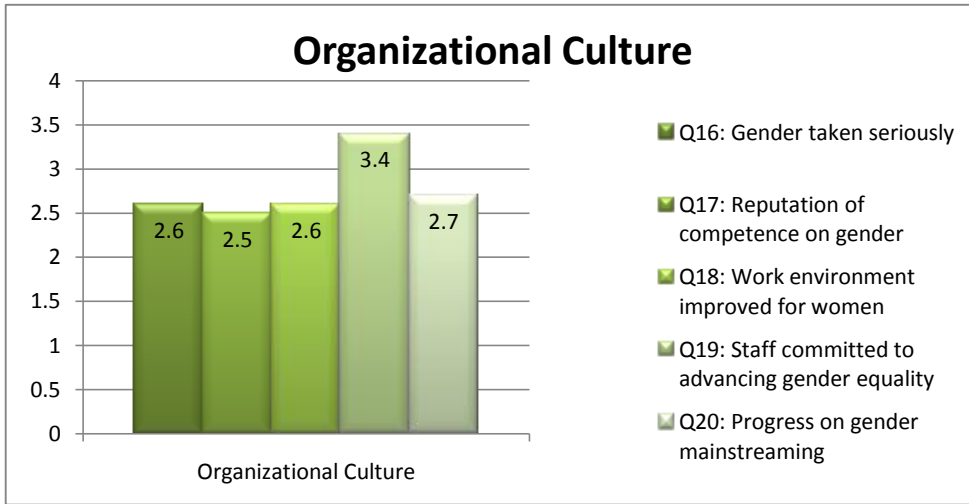


Question 4









21. What do you think your organization should do to mainstream gender equality?

List responses

22. Please describe any successes or challenges you have experienced in integrating gender in programming or other aspects of work in your organization.

List responses

Appendix H

InterAction Gender Audit

A Tool for Organizational Transformation ©

Long Questionnaire PowerPoint Report Sample

The Compassion Fund Gender Audit Questionnaire Results

Zamunda National Office Questionnaire Results

**InterAction
Commission on the Advancement of Women**

Introduction

- 1.** This presentation highlights the results of **The Compassion Fund's Zamunda National Office** Gender Self-Assessment Questionnaire.
- 2.** The CAW was commissioned by **The Compassion Fund Zamunda** to conduct a gender audit of its national and field offices.
- 3.** The CAW's gender audit process consists of three phases - a Self-Assessment Questionnaire, Focus Group Discussions and Institutional Action Planning.

I. Programming

program design and guidelines
program implementation
technical expertise
monitoring and evaluation
partner organizations

II. Organizational Culture and Support Functions

gender policies
staffing
human resources
marketing
financial resources
organizational culture

Two Dimensions of the Questionnaire

CAW's Gender Integration Framework

Political Will: Ways in which leaders use their position of power to communicate and demonstrate their support, leadership, enthusiasm for and commitment to working toward gender equality in the organization.

Technical Capacity: Level of ability, qualifications and skills individuals in an organization need to carry out the practical aspects of gender integration for enhanced program quality and level of institutionalization of gender equitable organizational processes.

Organizational Culture: Norms, customs, beliefs and codes of behavior in an organization that support or undermine gender equality— how people relate; what are seen as acceptable ideas; how people are “expected to behave;” and what behaviors are rewarded.

Accountability: Mechanisms by which an organization determines the extent to which it is “walking the talk” in terms of integrating gender equality in its programs and organizational structures.



GENDER

Male	62%
Female	38%

AGE

20-29	22%
30-39	26%
40-49	37%
50+	15%

BASE

National Office	20%
Field Level	80%

POSITION

Support Staff	20%
Assistant Staff	11%
Officers	46%
Associate Staff	3%
Management	12%
Coordinators	3%
Associate Directors	3%
Directors	2%

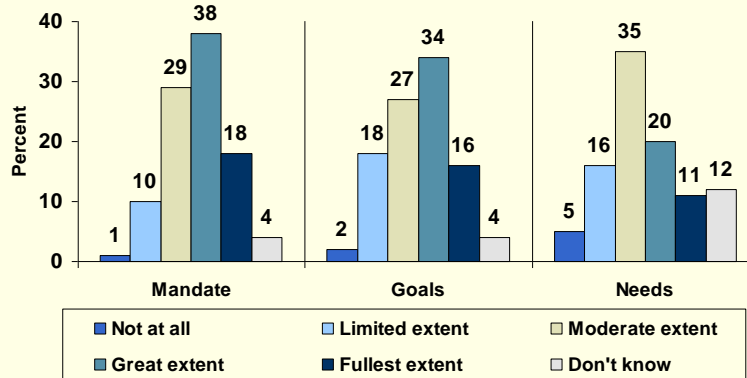
Demographics (N = 185)

Program Planning & Design I

Mandate
Is the integration of gender equity in programs mandated in the national office?

Goals
Are gender equity goals and objectives included in program designs?

Needs
For each program, is there a needs assessment, including an analysis of gender roles and responsibilities in the targeted community?

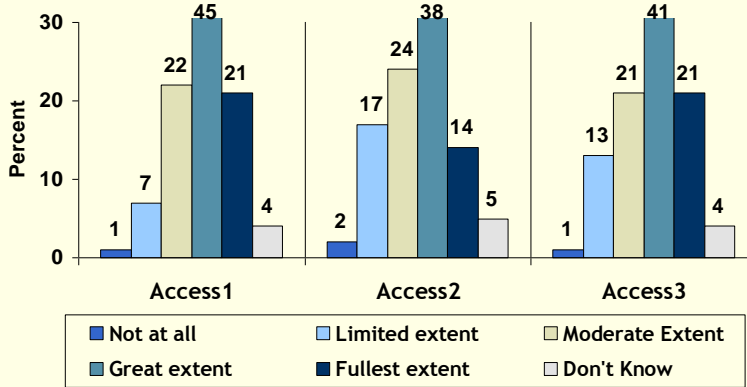


Program Implementation I

Access1
Does the implementation plan for the national office's programs/projects include activities that strengthen skills and provide women/girls with equal access to services and training?

Access2
Does the implementation plan for programs/projects include activities that strengthen skills and provide men/boys with equal access to services and training?

Access3
Do your project implementation strategies and plans take into account existing gender roles and interests of both male and female participants?

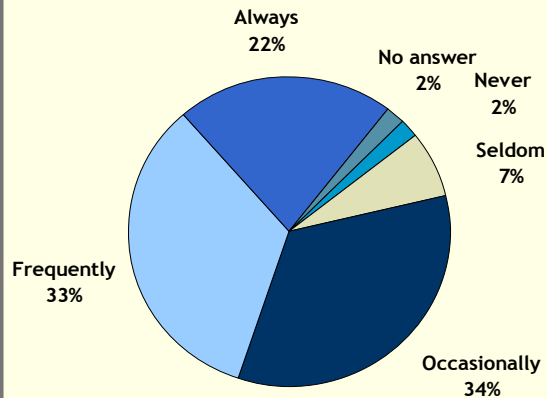


Program Implementation III

Obstacles to Incorporating Gender Analysis

	YES
Lack of staff training on gender	56%
Lack of gender analysis tools	42%
Level of staffing	42%
National culture	34%
Lack of financial resources for gender	24%
Organization size	24%
Office culture/environment	22%
Low organizational priority for gender	18%
Lack of support from senior management	10%

Technical Expertise III



Program/project planning, monitoring, evaluation and advisory teams in the national office consist of members who are gender-sensitive.

Monitoring and Evaluation III

The national office's programs/projects ...

CONTRIBUTE TO INCREASED GENDER EQUITY

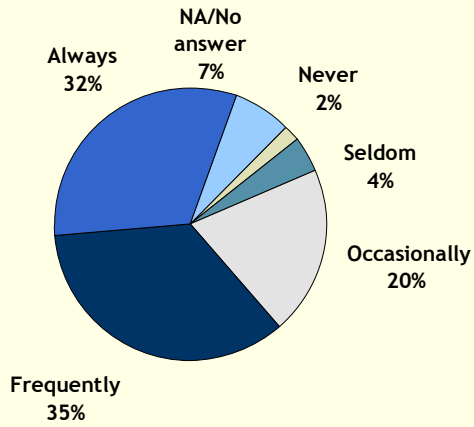
COLLECT GENDER DISAGGREGATED DATA

in the following areas:

	YES	NO	DK	YES	NO	DK
Material well being	85%	5%	8%	57%	12%	25%
Access to resources	87%	4%	7%	62%	11%	22%
Access to training	81%	5%	7%	60%	10%	18%
Participation in decisions	87%	5%	7%	60%	11%	22%
Self-respect/legal status	78%	8%	12%	49%	15%	29%
Control over benefits	68%	13%	16%	50%	18%	26%
Control over resources	68%	15%	11%	53%	14%	26%
Participation in public sector	62%	10%	19%	50%	14%	30%
Benefit to client's life	N/A	N/A	N/A	61%	10%	23%

Gender Policy III

Management takes responsibility for the development and implementation of the gender policy.

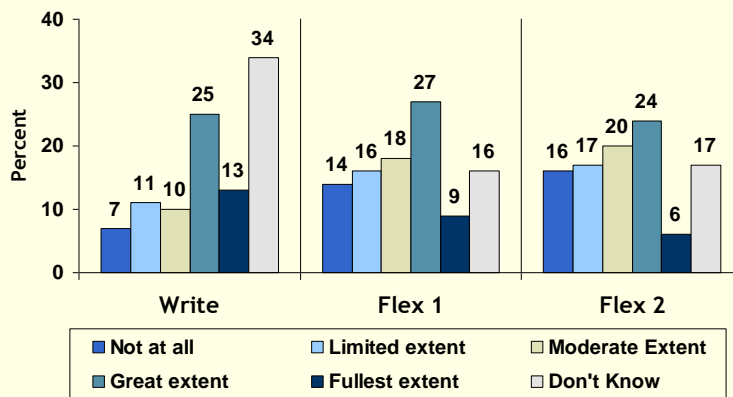


Human Resources I

Write
Is there a written equal opportunity policy?

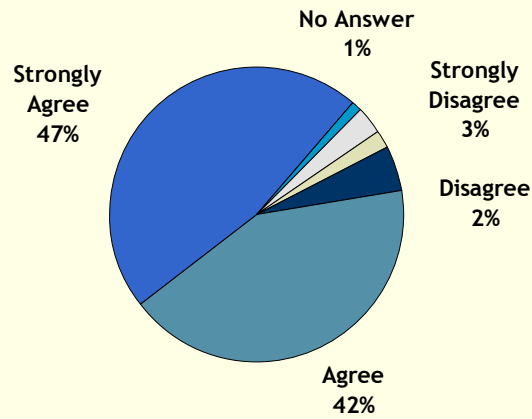
Flex 1
Are there flexible work arrangements in the national office?

Flex 2
Is staff encouraged to take advantage of flexible work arrangements?



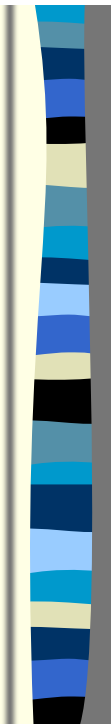
Human Resources V

The national office promotes team work, involving both men and women as equal partners.

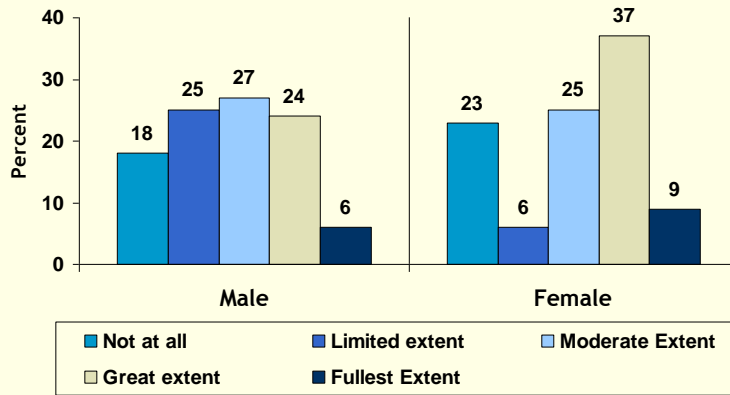


Significant Differences Between Men and Women

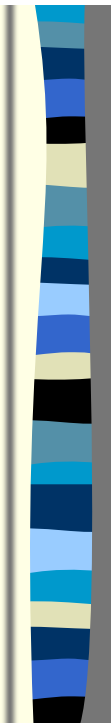
Responses to the following questions were statistically different for women and men.



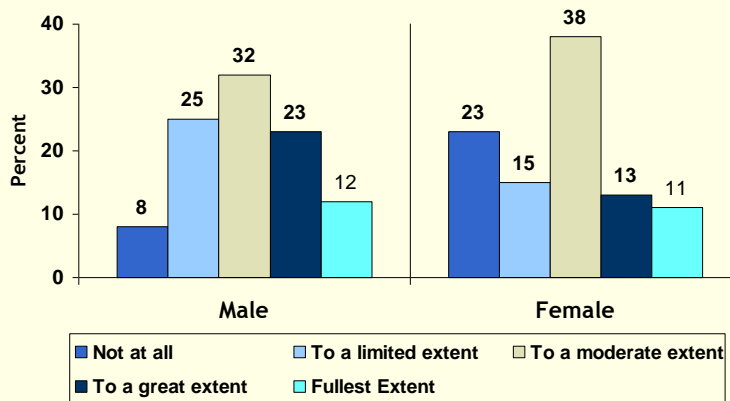
Is there assigned staff responsibility for gender integration in different departments?



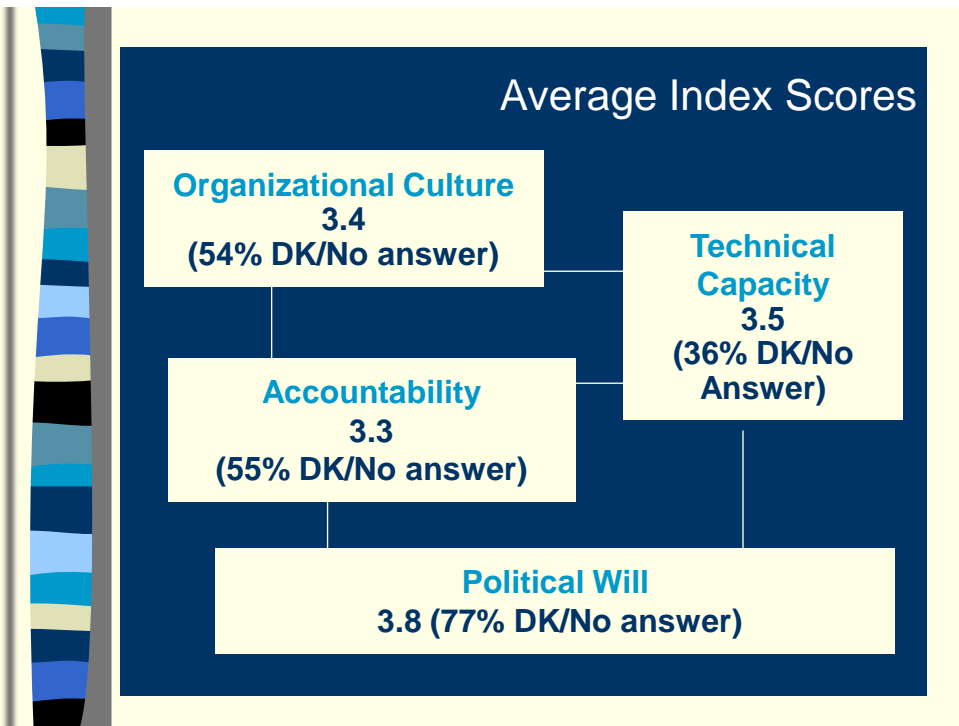
Chi-square: .023



Have staff members in the national office received training in gender planning and analysis?



Chi-square: .069



Challenges Facing The Compassion Fund Zamunda ...

The culture does not permit some people to participate in certain activities. The cultural backgrounds of the communities we work in pose challenges to our work. It is difficult to bring men and women together during community meetings. Male members of the community perceive gender integration as a threat. Men need to be educated in order to change their attitudes about women.

Because of illiteracy, women cannot participate in programs. Many women find it difficult to bring out suggestions at community meetings. Women are intimidated at group meetings. Women tend to separate themselves from men during meetings.

Many women are employed at The Compassion Fund Zamunda but few in high positions. Some men disagree with women being made leaders. Female staff struggle to keep family and working life together. It is not always easy for female staff to work alone because of bad roads. Work is sometimes too tedious for female staff.

Appendix I

InterAction Gender Audit

A Tool for Organizational Transformation ©

Newsletter Sample 1

USAID/Bangladesh GENDER NEWSLETTER

High marks for commitment to gender, respect for diversity

77 staff responded to the USAID/ Bangladesh gender survey in September 2003. Of the respondents: 28% were female and 70% were male, 73% were FSN staff and 27% were US employees. Respondents spanned from less than 1 year to more than 25 years of service. The mission received high marks for commitment to gender in the mission and to supervisors showing respect for diversity issues.

Respondents:

Female: 29%

Male 71%

GENDER POLICY

USAID Bangladesh created a **Women in Development (WID) Strategy** in 1994 and updated it in 1996. The WID goal was to empower women.

The **mission's strategic plan 2000-05** said the WID strategy remained valid and recommended that gender concerns be integrated across the board in mission programs.

A **gender action team (GAT)** provided guidance to the mission on gender matters but discontinued in 2001. A new gender team was formed in 2003 (see page 2).

What IS gender anyway??

Gender CAN mean any of the following:

- study of women's and men's roles in society and community
- study of men
- projects targeting women
- projects targeting men
- projects targeting households
- projects targeting mixed groups
- assessing women's and men's access to training, to resources, to land, to education
- responding to the needs of both men and women
- applies to all organization aspects, not just programming and projects

- 1 High Marks for Management Commitment to Gender
- 1 What's IS Gender Anyway?
- 2 Meet the Gender Team
- 2 WORDS We Throw Around....
- 3 Key Findings: Gender Survey
- 3 Notable Comparisons between Female and Male Responses
- 4 Action Recommendations: Staff Suggestions
- 4 What's a WID Strategy, What's a Gender Strategy?



Gender Team USAID Bangladesh

L-R: back row: Zareen Khair, Reazul Islam, Shahnaz Zakaria, Tahmina Haque, Shaheen Parveen, Mamunul Khan, Luna Purification, Liz Ali, Motahar Syed. Front row: Sughra Kabir, Tara O'Day Riffat Sulaiman, Muntaka Jabeen (honorary member), Jeannie Harvey, Sher Khan. Traveling members: Rowshan Akhter, Nishat Chowdhry

WORDS WE THROW AROUND.....

GENDER: The economic, political, and cultural attributes and opportunities associated with being male or female. These social aspects of what it means to be male or female vary among cultures and change over time (USAID, ADS glossary, p 88)

GENDER ANALYSIS: tools to help us examine the differences in roles that women and men play, including who benefits from projects and programs; who loses; who has access to resources such as food, education, etc.; who does not have access to resources; who has control of resources such as land, money; and who does not.

GENDER REQUIREMENTS: ADS specifies how we must incorporate gender into aspects of our work. For example, in human resources, an Affirmative Employment Program encourages us to recruit people who are underrepresented on our staff (e.g. women, minorities). All employees receive information about preventing sexual harassment and each will take a new required e-learning course on the topic. In programming, gender analyses must be conducted for all pre-design efforts and questions related to impacts on women and men are proposed for other stages of project management.

GENDER AWARENESS: A gender aware strategy considers different roles of males and females in activities that the strategy intends to affect, potentially leading planners to design different activities for different groups of people (e.g. male-only or female-only activities).

GENDER TEAM

WHO ARE WE AND WHAT ARE WE DOING?

The USAID/B gender team is made up of at least one person from each office in the mission.

Our task has been to understand what USAID requires us to do regarding gender.

We conducted a survey of gender issues in the mission. We offered preliminary gender training for mission staff and are developing regular gender trainings for all staff. Future topics will include:

- Gender analysis tools: project management and planning
- Gender: ADS & USAID
- Writing strong gender indicators
- Gender integration throughout USAID/B

We will develop a gender policy for the mission.

We will recommend specific ways USAID/B can become a leader in gender among USAID missions.



Gender Survey* Key Findings

- ✓ Staff overwhelmingly felt that supervisors show respect for diversity (80%) and that mission management takes gender seriously (80%)
- ✓ A majority of staff feel that USAID/B encourages gender sensitive behavior (65%)
- ✓ Program staff are aware that USAID mandates gender integration (77%). 67% know about ADS gender requirements and 60% use them.
- ✓ Most staff felt there was a person or office responsible for gender (83%) and 67% said there was a person on their team responsible for gender.
- ✓ **We can do more:** Most respondents felt the mission could do more to institutionalize gender (71%)
- ✓ Staff were not clear about which **benefits** they actually receive and which are encouraged.
 - ☑ **Flexi-time:** Most said flexi-time was available (80%) and about three-quarters (75%) felt they were encouraged to take advantage of it.
 - ☑ **Maternity & Paternity:** Most said there was maternity leave (76%) while most did not know if paternity leave was available (54%). More than half of FSNs felt they were encouraged to take advantage of it (52%). Most American staff were unsure.
 - ☑ **Child Care & Dependent care leave:** most staff did not know or felt that no child care was available. 44% said there was no policy for this leave and 51% said they didn't know.

STAFF IDENTIFIED OBSTACLES TO GENDER INTEGRATION AT USAID/BANGLADESH

Lack of staff training on gender	22%
Lack of gender analysis tools	16%
National [traditional] cultures	12%
Lack of financial resources for gender	11%
Low organizational priority for gender	10%
Office culture/environment	9%
Level of staffing	7%
Lack of support from senior mgmt	5%

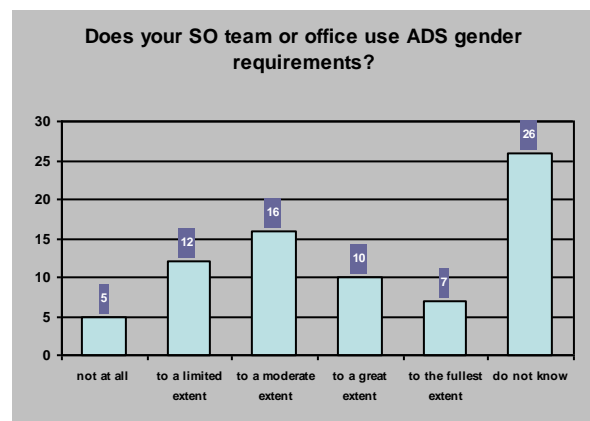
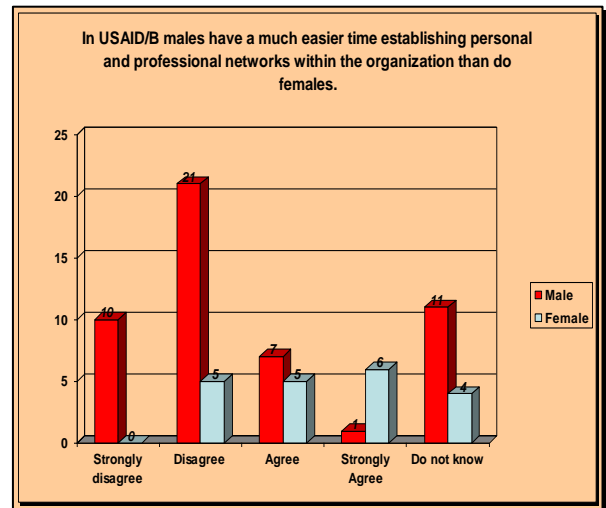
OTHER OBSTACLES WRITTEN IN BY STAFF:

- Lack of accountability
- Lack of political will
- Lack of trained female staff
- My sector doesn't have gender issues

COMPARISONS BETWEEN FEMALE & MALE RESPONSES

SOME AREAS WHERE MEN'S AND WOMEN'S VIEWS DIVERGED

- Nearly one third (30%) of the men agreed that everyone in the organization feels ownership over the gender policy, 5% of women agreed.
- More women (55%) than men (22%) feel that one obstacle to incorporating gender is "low organizational priority for gender issues."
- Men felt that gender equity was taken into account in strategic planning to a great extent (42%) than women (6%).
- More women (55%) agreed that it was easier for men to establish personal and professional networks within the organization; 16% of men agreed.



WHAT'S A.....

WID Strategy
Gender Strategy



USAID/B gender strategy 2003

The goal of the current gender team is to develop a gender plan of action with:

- ✓ Clear definitions regarding gender, “women in development,” “gender and development,” etc.
- ✓ Understanding what USAID/W and ADS require related to gender
- ✓ Staff trained in gender analysis, identifying gender indicators
- ✓ Simple, short and concise plan
- ✓ Clear roles and responsibilities for gender focal points, SO and office gender representatives
- ✓ Proposed funding for gender position and work (including training)

USAID/B WID Strategy 96-98

- Mission WID strategy integrated the roles of women into projects where appropriate
- Purpose of the WID strategy was to define the mission’s WID objective and to identify specific activities, including how they would be measured
- Intended that performance indicators would be structured to track impacts on women
- It called for a mission WID officer in addition to an in-house team that would track women’s empowerment

The strategy looked at each SO and identified indicators focused on women.



ACTION

RECOMMENDATIONS: Gender Survey

WRITTEN IN BY STAFF

- Integrate WID/gender strategy into sectors
- Need on-going support and resources for gender analysis, increasing gender expertise
- Separate SO for gender
- **Gender policy:**
 - ✓ Update gender policy or develop new one
 - ✓ Put on web page, disseminate widely, needs general circulation
 - ✓ Make it small, practical, working document
- **Human Resources:**
 - ✓ Increase gender equality
 - ✓ Look into child care and dependent care leave policies and FSN 1-3 benefits
 - ✓ Make sure to hire best candidate, not just look for certain type of person
 - ✓ Want more women in higher level positions
- **Financial resources:**
 - ✓ Earmark specific resources for gender training/assessment on an on-going basis
 - ✓ Create permanent gender advisor position
- **Training needs:**
 - ✓ Gender analysis, tools and techniques, evaluation, indicators
 - ✓ Mainstreaming and gender integration
 - ✓ Sector specific gender issues
 - ✓ Regular workshops, best practices, practical techniques
 - ✓ USAID gender policy, regs
 - ✓ Gender sensitive performance targets
 - ✓ Give us a way to do this systematically



Appendix I

InterAction Gender Audit

A Tool for Organizational Transformation ©

Newsletter Template

Your Organization Name Here

GENDER AUDIT RESULTS

Fertile Ground for Gender Integration at [Your Organization Name]

The results of the gender audit indicate that staff find a welcoming environment for gender integration at [Your Organization Name]. The scores were in the medium range for four of the Commission on the Advancement of Women's *Gender Integration Framework* components (Tree Diagram on page 2). The framework is a tool used by the Commission to measure staff perceptions of their organizations' level of gender integration. The Commission's experience with InterAction members suggests that organizations exhibiting the requisite level of *political will* accompanied by a positive *organizational culture*, *organizational accountability* and *technical expertise*, integrate gender quite successfully in their programs, management, and human resources procedures.

On a scale of 1-5, with "1" indicating a low level on the gender integration components and "5" indicating high, The Compassion Fund scored a ____ on technical capacity, ____ on accountability, ____ on political will, and a ____ on organizational culture. These scores, falling in the low to medium range, suggest an organizational openness at [Your Organization

continued on page 2

Headquarters and Field Staff Complete Gender Questionnaire

____ staff from Headquarters and the field participated in Gender Audit questionnaire in September 2003. Of the ____ respondents, ____% were female staff. Thirty percent of the respondents were between the ages of 24-30 with ____% ranging in ages 31-40; ____% were over the age of 41. Employees from a wide range of staff positions filled out the gender audit questionnaire. Most of the respondents (____%) were support staff; ____% were administrative staff; ____% were program staff; and 4% were senior management. Responses to the gender audit questionnaire came from staff in the field and at headquarters.

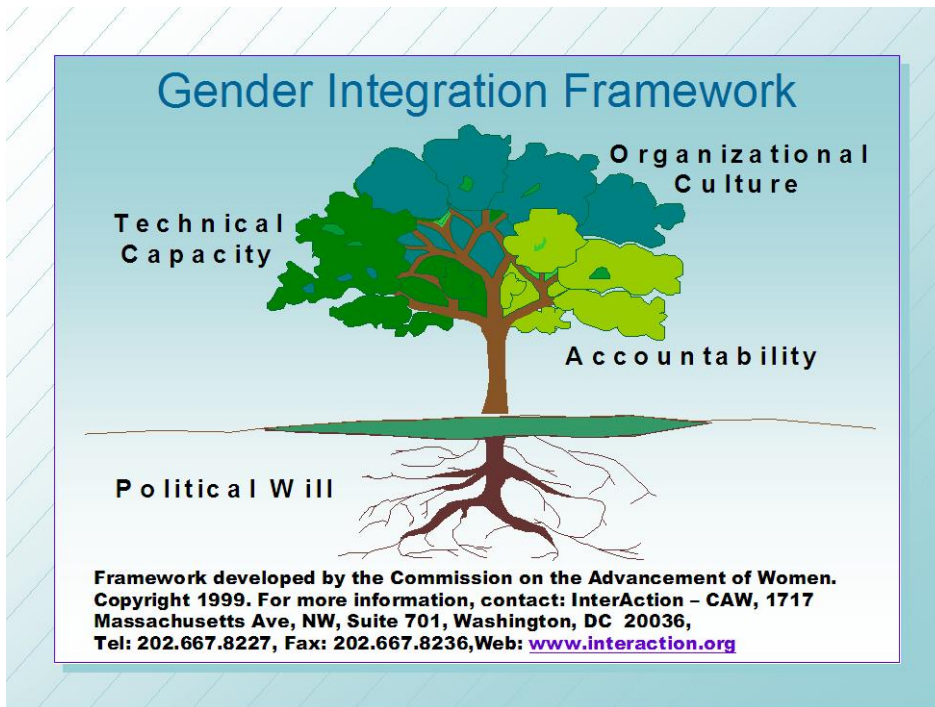
- 1 Headquarters & Field Staff Complete Audit
- 1 Fertile Ground for Gender Integration at [Your Organization Name]
- 2 How the Gender Integration Process Works
- 3 Staff Ratings of Levels of Gender Integration
- 3 Staff Identified Obstacles to Gender Integration at
- 3 Notable Comparisons Between Female and Male Responses
- 4 Successes of Integrating Gender at [Your Organization]
- 4 Challenges of Integrating Gender at [Your Organization]
- 5 Action Recommendations

Continued from Page 1 Fertile Ground...

Name] for gender integration efforts. However, staff overwhelmingly feel there is a need for greater technical expertise. These results fall in line with the recommendations staff identified in the gender audit. One-third of the respondents (____%) recommended actions to improve the _____ of the organization, the component with the lowest score. Staff recommended [Your Organization Name] develop staff skills in gender analysis and integration into their projects and programs through training. The highest number of recommendations (____%) focused on improving the _____ within the organization. Some recommendations in this area were

____ percent of the respondents recommended actions in the accountability component and suggested actions such as _____

____ percent of the staff gave recommendations related to the _____ component. This is not surprising, since staff feel that [Your Organization Name] has an organizational culture that supports gender equity; it is the highest index score (____).



Headquarters _____ %
Field _____ %

HOW THE GENDER INTEGRATION PROCESS WORKS:

Integrating gender in an organization’s programs and organizational structure is an organic process, which is akin to a living tree. The tree (above) symbolizes the gender integration process. At the core or base of the process is *political will*, represented by the roots of the tree. An organization with strong political will, like a tree with strong roots, is able to bear much fruit, in this case the fruits of gender integration - *technical capacity*, *accountability* and a positive *organizational culture*.

Strong political will, exhibited in a commitment of staff time and organizational resources, facilitates a process for building organizational technical capacity and ownership to attain gender sensitive programming, organizational structures and procedures. Organizational structures and procedures promote effective institutional accountability. Strides in the areas of political will, technical capacity and institutional accountability are sustained by a positive political culture whose institutional goal is the participation of and benefits to women and men in development and humanitarian assistance programs while promoting women’s leadership and equality in programs and organizational structures.

Staff Ratings of Levels of Gender Integration

The following table includes the average of staff's assessment of levels of gender integration in the 11 areas covered in the gender audit on a scale of 1 to 5 and the percentage of don't know/no answer responses for the 11 areas. Don't know/no answer responses are not factored into the 11 gender integration scores.

Gender Integration Area	Score
PROGRAMMING SCORES	
Monitoring and Evaluation	_____
Partner Organizations	_____
Technical Expertise	_____
Program Implementation	_____
Program Planning & Design	_____
ORGANIZATIONAL SCORES	
Financial Resources	_____
Gender Policy	_____
Human Resources	_____
Marketing and Communications	_____
Organizational Culture	_____
Staffing	_____

STAFF IDENTIFIED OBSTACLES TO GENDER INTEGRATION AT THE COMPASSION FUND

Lack of financial resources for gender	_____%
Lack of gender analysis tools	_____%
Lack of staff training on gender	_____%
Lack of support from senior mgmt	_____%
Level of staffing	_____%
Low organizational priority for gender	_____%
National [traditional] cultures	_____%
Office culture/environment	_____%
Organization size	_____%

OTHER OBSTACLES WRITTEN IN BY STAFF:

- No clear mandate from top leadership.
- Inadequate understanding of gender issues in development.
- Lack of a gender specialist or capacity within the organization.

NOTABLE COMPARISONS BETWEEN FEMALE AND MALE RESPONSES

Of the 50 respondents, 26 were women and 22 were men.

SOME AREAS WHERE MEN'S AND WOMEN'S VIEWS DIVERGED

- Women (85%) felt that [Your Organization Name's] gender policy does not have an operational plan that includes a clear allocation of responsibilities and time for monitoring and evaluation, whereas almost half (44%) of the men thought that the organization had a plan to some extent.
- One third (33%) of the men agreed that everyone in the organization feels ownership over the gender policy, whereas only 9% of the women agreed.
- The majority of women (68%) felt that there was no child care and dependent care leave policy at [Your Organization Name]; most men (72%) felt that a leave policy was in place to some extent.
- Most women (54%) disagreed or strongly disagreed that there had been a gradual increase of gender expertise among staff members in the organization, as compared to men (18%). Half (50%) of the men had no opinion.
- A little over half of the men (54%) felt not at all or to a limited extent that gender issues are taken seriously and discussed openly by men and women at [Your Organization Name], whereas most women (64%) felt this to a limited or moderate extent.
- The majority of men (91%) agreed or strongly agreed that men at [Your Organization Name] think that the organization is woman friendly, whereas only half (54%) of the women agreed or strongly agreed.
- The majority of men (78%) and women (72%) agreed or strongly agreed that women at [Your Organization Name] think the organization is woman friendly.

successes

IN INTEGRATING GENDER EQUITY AT THE COMPASSION FUND

- >> Publishing gender-sensitive indicators.
- >> Ensuring sessions on gender are included in all training courses.
- >> In search for fellowship participants, we always make it a point to give priority to women participants.
- >> Starting plans for integration of gender, rather than one-shot gender activities held in the past.
- >> Taking the Gender Audit.
- >> Gender sensitive statements/actions.
- >> Use of participatory approach to gender analysis.

challenges

IN INTEGRATING GENDER EQUITY AT [YOUR ORGANIZATION NAME]

- >> How to integrate gender in programming due to the lack of skills and knowledge among the staff. Thus, level of gender integration in each project depends a lot on the level of awareness, skills and knowledge of the individual project holder.
- >> Generally, a lack of consistency in the follow-up of gender-based initiatives, both in the Institute's projects and programs. Perhaps, because nobody is fully in-charge in the subject matter.
- >> Development of programs that will encourage partners to send more female trainees.
- >> Practice of evaluating gender separately and then integrating concerns into programs/ project planning

[Your Organization Name] INDEX SCORES

The following indexes are based on the set of questions that comprise each of the four areas of the CAW's Gender Integration Framework.

Scores range from 1 (low) to 5 (high).

accountability _____

organizational culture _____

political will _____

technical capacity _____

ACTION RECOMMENDATIONS

WRITTEN IN BY STAFF

accountability (____%)

**organizational culture
(____%)**

**technical capacity
(____%)**

political will (____%)

Appendix J

InterAction Gender Audit

A Tool for Organizational Transformation ©

Focus Group Report Sample

Gender Audit Focus Group Report

Results from Focus Group Discussions September 2002

*The Compassion Fund** has been undergoing an organization-wide Gender Audit with technical assistance from InterAction's Commission on the Advancement of Women (CAW). The Gender Audit is the CAW's organizational assessment and action planning process, which helps InterAction member agencies to identify institutional strengths and challenges to integrating gender equity in programs and their organizational structures and processes. National office and field office staff filled out questionnaires and participated in focus group discussions.

For *The Compassion Fund* to successfully integrate gender equality in its programs and organizational structure, the CAW highlights the importance of four factors - political will, organizational culture, technical capacity, and accountability. According to the CAW's Gender Integration Framework, organizations that exhibit the requisite level of political will, accompanied by a positive organizational culture, institutional accountability and technical expertise, integrate gender equality successfully in their programs, management, and human resources.

The following recommendations are compiled from the focus group discussions held at *The Compassion Fund*. Each focus group began with an explanation of the purpose of the focus groups, an introduction of the CAW's Gender Integration Framework, and a review of the results of *The Compassion Fund's* Gender Audit Questionnaire.

**Compassion Fund* is a fictitious organization.

Focus Group Questions

1. *Which of the results of the Gender Audit (GA) were in line with your experiences at *The Compassion Fund*?*
2. *Which of the GA results were a surprise?*
3. *What do you recommend that *The Compassion Fund* do to build on its strengths and address remaining challenges?*
4. *What is your vision of gender equality for *The Compassion Fund*?*

Issues-Recommendations

Recommendations and Concerns

Gender Policy

- We need to contextualize the gender policy for The Compassion Fund.
- More communication needed on the implementation of the gender policy.
- The gender policy needs to be supported by staff at all levels.
- The gender equality initiative needs to be participatory and build buy-in in the communities The Compassion Fund works with.
- Need to maintain strong political will for all gender equity activities.
- Staff need to know that the gender policy is a priority and how it impacts their work.
- All gender equality activities need to be transparent.
- Need to use The Compassion Fund's faith and mission statement to promote the gender policy activities within the organization. Need to link the gender policy with The Compassion Fund's mission statement.
- The gender policy should not just favor women, it needs to provide equal opportunities for both men and women.
- The organization needs to "walk the talk."

General Comments

"Teach people that whatever a man can do, women can do in their own way."

"The national director should receive an award for spearheading the gender equity effort."

"Reward those doing good work on gender."

"The Compassion Fund needs more male GAD officers, make it more gender-balanced."

"Gender mainstreaming is not about the numbers, but rather building the capacity of women so that they have equal opportunities as men."

"In regards to recruitment and promotion, the most qualified person is not necessarily the best performer. Staff with the minimum qualifications and relevant experience should be given the opportunity to occupy vacant positions."

"The Compassion Fund must address staff that become 'stale' in occupying their positions for a long time."

Technical Capacity

- All managers, both male and female, should be trained in improving their management skills.
- Training needs to be more participatory and systematic within The Compassion Fund.
- Gender analysis tools need to be developed and then staff need to be trained to use these tools.
- The Compassion Fund needs to administer gender training in a non-threatening way so that no one feels sidelined.
- Empower women to perform, particularly in senior management. They should be encouraged to take risks.
- The Compassion Fund needs to provide leadership training for more women so that they can develop their skills as managers for the organization.
- Teamwork needs to be emphasized in all training.
- Need to organize more gender training workshops, more frequently.
- More capacity building needed in order to help staff incorporate gender at the field level.

Staff & Awareness

- There should be a continuous flow of communication on gender issues in the organization.
- Need to educate the staff at all levels on gender equity, from junior staff to the board of directors.
- Need to educate staff on why gender activities are important.
- Sensitization on gender issues must continue with staff in the organization and in the community.
- Need to dismantle the myth that gender equity is about promoting women only. It needs to be clear that gender equity is about both men and women.
- As The Compassion Fund moves forward on the gender integration activities, it is important to get buy-in from individuals. This can be done through education and building awareness.
- More information sharing.
- Quarterly gender sensitization meetings for both the staff and the communities.

Financial Budgeting for Gender

- All staff need to be informed of the 2% budget line item for gender because some staff feel that there is a lack of financial resources for gender activities.
- Recommendations need to be made on how to spend the allotted gender budget. The Compassion Fund should develop guidelines on how the money should be used.
- This money should be monitored so that The Compassion Fund knows what it's being used for.
- Need to hire a male gender coordinator.
- Staff should be held accountable for all resources allocated for gender, i.e. staff must document how all gender activities will impact their programs.

<i>Cultural Challenges & Resistance</i>	<i>Programming Needs</i>
<ul style="list-style-type: none"> ▪ There needs to be a strategy for formal education for women and girls – one that will address the cultural mentality that boys should be sent to school before girls. ▪ Create an environment where men do not feel threatened by gender equity. Need to be clear that gender discussions should include both men and women. ▪ Ensure that female managers feel comfortable around male managers. ▪ Need to address the impact culture has on gender relations. The Compassion Fund needs to use its faith to reinforce and promote gender equity within the organization. ▪ There is a lot for us to do on gender equity because of traditional roles in the culture. Need to address the culture piece. 	<ul style="list-style-type: none"> ▪ Programs need to collect gender-disaggregated data. ▪ Establish a monitoring and evaluation system to ensure that The Compassion Fund is achieving its gender equity goals. ▪ Programming guidelines need to be developed to ensure gender is included. This will help staff understand what we are doing on gender and why. ▪ Need to fill the gaps and link programming design, implementation, and monitoring & evaluation. ▪ Develop a policy and guidelines on how The Compassion Fund works with its partners. ▪ Need more coordination and systems of how projects are planned for. ▪ More coordination with the national office and field offices. ▪ Need to develop systems of reporting.

<i>Human Resources</i>
<ul style="list-style-type: none"> ▪ Recruitment and promotion systems, processes, and procedures need to be clearly developed and transparent. ▪ Need to develop a promotion system based on merit. The current promotion system is unclear and staff interpret the system as unfair. ▪ Staff need to be informed of what the current HR policies are at The Compassion Fund, i.e. adoption of the recent paternity leave policy. ▪ The organizational structure and hierarchy of the organization needs to be clear and transparent. ▪ Need to synchronize all positions and help staff understand their relationship to one another. ▪ A person should be informed when being transferred to a new position. Currently, there is no system, so many people end up feeling sidelined. ▪ The Compassion Fund should strongly encourage its staff to visit their families (or vice versa) when they are away in the field for long periods of time. ▪ Appraisal systems need to be evaluated and feedback should be required at all levels. ▪ Offer more professional development opportunities.

Visions of a Gender Sensitive Organization

- See people educated in a way that when there is a movement on gender issues, they will not be defensive. Want to make sure people understand and support gender equity.
- A gender-balanced organization, where staff respect each other. This message would then catalyze change in the rural communities.
- An organization where men and women work as a team, without posing any threats to each other, a true partnership.
- Women will see and believe that they can do what men do and The Compassion Fund will set an example at the community-level.
- Women being able to take advantage in top leadership roles and having an impact in the communities The Compassion Fund works with.
- Gender-threat phobia is completely removed.

- Situation where men and women respect each other's work and management style.
- Sensitization of staff and true appreciation of men and women's individual skills and talents.
- Men and women work in true partnership, in harmony, supporting each other as a team.
- Equal opportunities for men and women in professional development and training.
- Well-structured and clearly defined guidelines for the gender policy.
- A greater understanding of gender issues in order to build a better partnership between men and women.
- Merit-based promotion systems in place.
- The communities we work with will see the benefits of gender equity for men and women.
- Gender equity is valued and shared; everyone has bought into it, so it doesn't feel forced.

Comments Specific to Components of the Gender Integration Framework

<i>Political will</i>	<i>Organizational culture</i>
<ul style="list-style-type: none"> ▪ Political will index is a true reflection of what has happened at The Compassion Fund. There has been an increase in women field-level managers, The Compassion Fund has been proactive in the past three years to mainstream gender – and it's been successful. ▪ The political will has always been good at The Compassion Fund. ▪ Compassion Fund leaders have strong political will within the org, but there are real challenges. For example, in the field, it's hard to implement and put things into practice because of the culture. Traditional culture presents real challenges because men have not come to terms with women speaking in public and addressing a group. The organization is supportive, but we must take into account the community we are working with. How do we get the society to move along with us and break traditional notions of men's and women's roles? ▪ We need to ensure that there is strong political will at all levels, permeating the organization, so it makes it easier to implement gender equity in all aspects of programming. ▪ The national director gives a lot of support for advancing women within the organization. There is strong political will and the national director affects the culture of the organization. 	<ul style="list-style-type: none"> ▪ Staff do not understand the issues, even though there is high political will. There is a hostile environment that does not embrace gender equity. ▪ Need to create an environment where men do not feel threatened. ▪ Need to educate the staff on why gender equity is important. ▪ Maybe the organization moved too fast to move gender in the organization. Perhaps the organization wasn't ready. It seems that all gender issues come with pressure. Gender equity is sometimes misunderstood as force. ▪ The organization needs to be very transparent. Everyone in the organization should know what is happening with the gender equity initiative, to help counter any resistance. ▪ The Compassion Fund needs to create an environment which encourages women to take on new responsibilities in the organization. <p>Women might be given the opportunities to advance in the organization and communities, but culture can be pose a challenge in their advancement.</p>

Accountability

- The financial resources allocated for gender should be monitored. The Compassion Fund needs to find out how the money is being spent and make recommendations for future activities.
- Good work on gender should be rewarded.
- The Compassion Fund should collect data on gender issues in programming and set up monitoring and evaluation systems.
- The reporting form of The Compassion Fund should be structured and developed. A more thorough reporting process is needed.
- Need more coordination and systems of how projects are planned for.
- There needs to be more transparency about the 2% gender allotment because staff have different perceptions on how the money is being used and the process in which it is spent.

Technical capacity

- More women than men felt that staff members in the national office had not received any training in gender planning and analysis. Training and gender sensitization has not been deliberate at The Compassion Fund. It should be more so. We have the political will at The Compassion Fund, but we need to focus more on training – so it's not surprising that the highest number of recommendations is in technical capacity.
- The tools for gender analysis do need to be developed. The Compassion Fund doesn't have them and this is a challenge in integrating gender. Political will isn't enough, we need the gender analysis tools so that the political will isn't hanging. The tools will help The Compassion Fund move from political will to action.
- The organization seems to be focusing on promoting women. Staff need to be educated that gender equity is not only about men and women.
- Staff need to be exposed to gender analysis tools before they can move forward on gender integration.
- Gender policy activities should be flexible because gender applies differently to different sectors.
- The Compassion Fund should train new managers to build their managerial skills.

Appendix K

InterAction Gender Audit

A Tool for Organizational Transformation ©

Gender Action Plan Template & Sample



Gender Action Plan

The staff of _____ *(write in your organization's name)*

envision an organization where ...

Below, we suggest you write several of the visions identified in the Focus Group discussions that capture the key essence of what your "gender equitable" organization looks like.

Name of organization: _____

Gender Action Plan (write in year) _____

Developed by _____ Date: _____

Updated: _____

Updated: _____

ACTIVITIES	WHEN	HOW LONG	WHERE	RESPONSIBLE PARTY	WITH WHOM	RESOURCES
[sample] Build capacity of Gender Team.	Now	2 years	All offices	HR, Capacity Building Unit	GAD Coordinators	Training, budget, materials travel, logistics, consultants
[sample] Review and implement a transparent appraisal system.	Now	Ongoing	All offices	HR	Sr. Mgmt.	Core time
[sample] Update gender strategy, develop guidelines for GAD policy.	1 st Quarter 2003	6 months	All offices	GTF, QSD, HR, Finance Dirs	PO GAD	Core time, materials, funds

