



# Guide on Mainstreaming *Gender Equality* into the Program Cycle

*A publication of AQOCI's Comité québécois femmes et développement (CQFD) Community of practice "gender in practice"*

Guide on Mainstreaming  
*Gender Equality*  
into the Program Cycle

A publication produced by AQOCI's "Gender in Practice" Community of practice and the CQFD.

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# ACRONYMS

AQOCI	Association québécoise des organismes de coopération internationale
CIDA	Canadian International Development Agency
COP	Community of practice
CQFD	Comité québécois femmes et développement
DFATD	Department of Foreign Affairs, Trade and Development
GAD	Gender and Development
GE	Gender Equality
ICO	International cooperation organization
IDRC	International Development Research Centre
PIP	Program Implementation Plan
LM	Logic model
NGO	Non-governmental organization
OECD	Organisation for Economic Co-operation and Development
PMEL	Planning, monitoring, evaluation and learning
PMF	Performance measurement framework
RBM	Results-based management

# FOREWORD

For over 30 years, the *Comité québécois femmes et développement* (CQFD) has coordinated a network of individuals from AQOCI's member organizations and various other sectors, including women's groups, academia, labour unions and community groups. Coordinated by the AQOCI, its mission is to provide a space for exchange and critical reflection on all issues affecting the role of women in international cooperation. The CQFD promotes a feminist vision of development and fosters ties of solidarity between women's groups from the North and their counterparts from the South. In 2009, CQFD facilitated the creation of the "Gender in Practice" community of practice (CoP), that encourages reflection and exchange of good practices in promoting gender equality. The CoP brings together more than 10 international development organizations with the objective of creating a culture of learning and knowledge-sharing that fosters the mainstreaming of GE in cooperation programs as well as internally within organizations.

A needs assessment by members of the CoP permitted the identification of gender mainstreaming priorities in organizations and programming as a priority. Based on the needs assessment, representatives from four organizations - *Carrefour International*, *Oxfam-Québec*, CESO and SUCO - formed a working group to develop a guide on gender mainstreaming in the program cycle, from planning and implementation to monitoring, evaluation and learning, thereby providing practitioners with a tool adapted to the needs of their organization. The working group also benefited from the contribution of the intern Simidéle Orimolade, who did an inventory of tools from various organizations, coordinated the working group's activities and wrote various sections of this guide.

Not wishing to reinvent the wheel, the members of the working group drew from their experience to prepare a user-friendly guide on mainstreaming gender in programming that is based on proven and adaptable tools. This is a "turnkey" document intended for both program managers and partners in the field who already possess knowledge and competencies in relation to gender equality. Our "Guide on Mainstreaming Gender into the Programming Cycle" is a complementary tool, as well as a follow-up to a suite of CQFD tools, including the "*Genre et développement*" and "Promoting Gender Equality: From Theory to Practice" training kits, which is intended for persons with difference levels of knowledge of GE.

The members of the working group who developed this guide are first and foremost practitioners with many years of experience in Africa, Latin America and Asia. Their primary concern and objective is to propose a guide on mainstreaming gender into programs that will help other practitioners to ask the appropriate questions during program planning, implementation, monitoring and evaluation.

We hope that this guide, which was written in a true spirit of solidarity and collaboration, will facilitate GE mainstreaming in programs and thereby contribute to transforming behavior and attitudes in different parts of the world, enabling women and men to participate side by side in the development of their communities.

# INTRODUCTION

The importance of gender equality (GE) in the fight against poverty and in favor of social justice has already been acknowledged for several decades. However, taking GE into consideration at the structural and organizational level remains a challenge for international cooperation organizations and requires a strong political will. In fact, gender mainstreaming in programming is often punctual and in response to the demands of donor agencies. One of the challenges faced by organizations is mainstreaming gender in programs that are subject to a results-based management (RBM) approach. Indeed, the rigid character of management tools can add a level of complexity to integrating gender-sensitive outcomes into evaluation systems. Furthermore, many ICOs do not have standardized tools for mainstreaming gender into their programs.

Given the challenges faced in mainstreaming gender in programming, the CoP devoted the bulk of its efforts to designing a simple and practical guide for program managers and development organizations in the North and South. As the majority of Canadian NGOs receive funding from the Department of Foreign Affairs, Trade and Development (DFATD), we adopted the principal tools used in DFATD's RBM approach. However, the tools in this guide can easily be adapted to tools used by other donor agencies.

As an introduction to the guide, we begin with an overview of the programming cycle followed by guide's five sections which include objectives, tools and checklists. The five sections are as follows:

1. Program identification
2. Program planning and design
3. Program implementation;
4. Program monitoring and evaluation
5. Learning.

These tools may be adapted and this guide enriched with the experiences of other organizations. We want this guide to be as practical and as complete as possible for each of the five stages in order to facilitate programming that integrates GE.



# THE PROGRAMMING CYCLE

To ensure that we're all on the same page regarding the program cycle, we will do a brief overview before examining each section in turn. These sections, incidentally, are not necessarily sequential.

The "program identification" phase consists of an analysis based on data collected through assessments and research done with program stakeholders. These analyses help to establish a program's overall orientation in accordance with needs and priorities. Next comes the program's "planning and design" phase, also carried out in collaboration with program stakeholders. The data collected is used to design the program outcomes, indicators and risks and to develop a gender-sensitive budget. Then comes the "implementation" phase, in which activities are executed to achieve target outcomes. The "monitoring and evaluation" of the program's progress and success in attaining outcomes is integrated into the cycle to enable course corrections and to measure changes, as well as note the "learning" that occurs over the course of program implementation. Furthermore, these phases are all conducted in collaboration with the stakeholders identified with the program's learning experiences.

It is important and advisable to follow a participatory approach throughout the program. The program has a higher rate of success when women are involved in the planning and evaluating activities and results. But more importantly, the process is as important as the result, because women's participation and their active role in program decision making, intrinsically contribute to their empowerment.

It's also important to note that the term "program" will be used to designate the management cycle in the sections discussed below. However, this guide may also be used to mainstream gender in projects, hence the following distinction:

→ In project management, a program is a set of projects that all contribute to reaching the same objective.

→ A project is a set of activities and actions undertaken with the goal of meeting a defined need, while respecting timelines and the resources budgeted.



**Identification:** program's overall orientation is set; initial assessment is done.

**Planning:** the program is designed and the proposal written.

**Implementation:** planned activities are launched and completed to achieve specific outcomes.

**Monitoring/Evaluation:** the program's progress is monitored to enable adjustments, as required; regular assessments are done to evaluate progress in achieving outcomes.

**Learning:** lessons are drawn from the experience.

# 1 **SECTION** PROGRAM AND STAKEHOLDER IDENTIFICATION



## 1 : PROGRAM AND STAKEHOLDER IDENTIFICATION

### 1.1 Introduction

### 1.2 Identification of the Program’s Gender Equality Dimension

### 1.3 Evaluation of the Importance that Partners accord to Gender Equality

### 1.4 Assessing the Importance Donor Agencies accord to GE

### 1.5 Analysis of Influential Interest Groups and the National Context

## 1.1 INTRODUCTION

This section refers to the first steps, which precede program planning and design. This is an important stage because it produces the initial elements of an analysis that will inform the decisions of the persons in charge of the other stages: program planning and design, implementation, monitoring & evaluation and learning. Of course, the same individuals may be in charge of these other stages, but that isn't always the case. Consequently, it's important to systemize the information collected to ensure that the process remains coherent from one stage to the next. Please note that many of the activities discussed here may be conducted simultaneously. There isn't necessarily a given order to be respected.

For our purposes, programs may be divided into two main approaches, as a function of their relationship to GE:

**The GE specific or gender stand-alone approach:** This category applies to programs that specifically target one or more gender equality issues. For example, projects/programs with specific goals such as strengthening women's autonomy, empowering them, increasing their self-confidence, and increasing their capacities to organize and defend their rights. If a project has a GE specific approach this does not signify that it is only addresses women, as such a project may also tackle an issue, such as violence for example, by addressing men through interventions to promote changes in behavior and encourage them to reflect on their responsibilities.

**The crosscutting approach to GE:** This applies to programs that target specific thematic areas like food security or economic empowerment, but where gender equality must be mainstreamed. It is therefore necessary to identify the gender equality issues in the program's individual components. For example, projects to aiming to improve access to water for rural populations, or to strengthen young farmers' technical skills, would require a crosscutting approach. In these cases, it's necessary to identify the specific constraints encountered by women and determine the corresponding target outcomes and actions.

### OBJECTIVES OF THE PROGRAM IDENTIFICATION PHASE

- Identify the **relevant elements** of the program in terms of GE.
- Identify the program's implementing partners and assess **their interest** in GE issues.
- Identify donor agencies/other collaborators and assess **their interest** in GE issues.
- Identify other organizations and institutions that may have an influence on the program's GE dimension.

Program identification can take place in a number of different situations, but generally speaking, it is the following three that usually determine how this process proceeds (with implications for the subsequent stages as well):

- The program is the subject of a call for tenders, which signifies that certain elements are already identified: the target population, country/regions, the expected results, the main components of the program, etc.
- The idea for the program was identified by a local partner and submitted to an International Cooperation Organization (ICO) that examines the proposal and decides whether to develop a program with the local partner.
- The ICO seeks to develop a specific expertise or work on a specific issue, or target a need identified by the communities where it is active.

It's important to consider where and how the idea for the program originated and adapt the next stages to that specific context. This enables the development of a proposal consistent with the context.

In the following sub-sections, we will present the different stages pertaining to a fictional call for tenders. Of course, in the case of a proposal from a partner or of a program initiated by the ICO itself, certain stages will be less pertinent than others or may have already been carried out prior to program identification. Adapt these stages in accordance with the requirements of your particular situation.

**Program example:** Project to improve family nutrition in Nicaragua.

**Background:** In Nicaragua's central region, food insecurity is widespread, particularly among small holder farmers. This arid region is characterized by land degradation, scarce natural resources, reduced access to water and electricity. This program aiming to improve family nutrition in Nicaragua supports interventions linked to market gardening, crop diversification and the production of surpluses for commercial sale. The program components highlighted in this case study are focused on the prevention and treatment of malnutrition.

(This program requires taking a cross cutting approach)

## 1.2 IDENTIFICATION OF THE PROGRAM'S GENDER EQUALITY DIMENSION

The issue here is to 1) identify the program's main components, 2) identify GE issues in each of them and 3) begin identifying appropriate actions.

This activity is most often carried out in an ICO's head office or in its field offices (as the case may be). Ideally, a field visit is necessary to ensure a good understanding of the country's specific context and the intervention's stakeholders/target populations. Program managers should consult with local organizations, particularly women's groups, who are well placed to identify and comprehend the GE dimensions of the various program components.

**What are the program's main components?**

1. Put into place a **monitoring system** for chronic and acute cases of malnutrition among children five years old and younger;
2. **Enhance the knowledge base** of families concerning good nutrition.

**Who is generally in charge of the various responsibilities addressed by the program's different components? Men, women or both equally?**

*In rural communities of Nicaragua, nutrition (i.e., shopping and cooking) and child rearing is primarily a woman's responsibility. Men are primarily responsible for food production (i.e., farming). However, women are also heavily involved in farming but their contribution is rendered invisible, often described as « helping their husbands » or explained as a prolongation of their domestic responsibilities.*

**What aspects bear directly on gender equality issues in the program's different components?**

**1<sup>st</sup> component - the monitoring system:**

- I. How can this system be organized to ensure that women play an active role in monitoring?
  - Adapt training to women's education levels, especially if it is lower than men's; provide some training exclusively to women.

- Select a site where children will be under supervision (taking into account distance from homes, security, etc.).
  - Take into account women's domestic responsibilities, etc. when scheduling training and activities.
- II. How do we ensure men's involvement in a task that traditionally falls to women (e.g., children's nutrition and health)?
- Directly invite men to participate in workshops on detecting malnutrition issues.

**2<sup>nd</sup> component – enhancing the knowledge base of families as regards nutrition and healthy diets:**

- I. How do we ensure that women adequately benefit from trainings and that their own knowledge is taken into account? How do we ensure that their leadership is strengthened?
- Adapt trainings to their education levels; make training locations and schedules appropriate for women (safety, distance, their existing activities).
  - Take into account women's traditional/ancestral knowledge in order to adapt this knowledge to today's realities.
  - Involve women in the organization of public awareness campaigns in their communities.
- II. How do we ensure men's involvement in a task that more traditionally falls to women (e.g., children's nutrition and health)?
- Involve men in discussions on the nutritional value of the food they produce on the family farm or which is purchased with the income generated by the farm.

### 1.3 EVALUATION OF THE IMPORTANCE THAT PARTNERS ACCORD TO GENDER EQUALITY

At this stage, it's necessary to determine partner selection criteria (i.e. knowledge of the sector of intervention, familiarity with the zone targeted by the program, experience in similar programs, integration of GE issues, etc.) It's not necessary that GE be one of the partner's strengths, as one of the program's goals may be to build the partner's capacities in this area. What is most important at this stage is a potential partner's openness to promoting GE.

The following table enables the identification and assessment of a partner's interest in and experience with GE issues. Several sources may be used to complete it, including your own knowledge of the partner, consultations with other organizations (local ones or ICOs) who know the partner, donor agencies, etc. Of course, the main source of information is the partner organization itself. In any case, it is always essential to validate information with the partner. It's also important for the partner to not feel "under investigation" or "judged" during this exercise. Your actions must be frank and transparent and you must explain that this exercise essentially serves to identify the partner's capacity building needs during program implementation.

**TABLE 1: GENDER EQUALITY PARTNER ASSESSMENT**

Question	Answer	Comment/follow-up
Has the organization adopted a gender equality policy? If so, when?	Yes. In 2010.	
Is there a process for implementing the policy (work plan, action plan)?		
In the absence of a GE policy, does the organization take GE into account, in practice, programs and functioning? Is management committed to GE?	Yes, there is an equal opportunity hiring policy.	
Does the organization have tools/methods for integrating GE internally? If so, please specify		
Is there a person in charge of GE issues within the organization?		
Do the majority of programs include GE specific outcomes?		
What are the organization's principal strengths in relation to GE?		
What internal and external resources have been mobilized around GE issues? What are their training needs?		
Is there an interest in developing GE issues within the organization? If so, specify at what level.	Yes.  Staff training and mainstreaming in programming.	

## 1.4 ASSESSING THE IMPORTANCE DONOR AGENCIES ACCORD TO GE

It's important to have good understanding of a program's potential donor agencies, their GE policies, past GE interventions, the language they use, etc. Such knowledge about donor agencies facilitates presenting the program in a manner consistent with the GE orientations of given donor agencies – a non-negligible dimension in any potential analysis of the program and its chances of success.<sup>1</sup>

### A few key questions and actions:

Does the donor agency (or donor agencies) have a GE approach? If so, it's important to read the relevant documents, policy positions, strategies and policies to accurately ascertain their orientation, positions and the language they use.

Has the donor(s) ever funded similar programs? Were reports produced? If available, read the project documents and the reports produced, paying particular attention to the sections specifically concerned with GE.

<sup>1</sup> Many ICOs receive DFATD funding. Here's DFATD's policy on gender equality: <http://www.international.gc.ca/development-developpement/priorities-priorites/ge-es/policy-politique.aspx?lang=eng>

## 1.5 ANALYSIS OF INFLUENTIAL INTEREST GROUPS AND THE NATIONAL CONTEXT

Programs are not carried out in a vacuum where they have total control over external factors. They take place in specific contexts and are subject, potentially, to numerous factors. It's important to be familiar with the local environment, to identify stakeholders and be capable of determining, at least partially, whether these groups are likely to have a positive or negative influence on the program's GE dimension. It's also important to take into consideration the host country's current policies and any international agreements to which it is a signatory that may create a favourable (or unfavourable) climate for the program's success.

The following table presents an example of an analysis of influential interest groups.

**TABLE 2: GENDER EQUALITY STAKEHOLDER ASSESSMENT**

Program to support women entrepreneurs in Jordan			
<u>Stakeholders</u>	<u>Degree of influence</u>	<u>Risks</u>	<u>Opportunities</u>
Village committees			
Religious institutions	High	Resistance from religious leaders to women's empowerment	Positive influence of certain religious leaders re sharing of domestic labour responsibilities
Local associations and organizations			
Radio or television stations Other media	Intermediate		Openness to broadening a radio station's programming to include content on the economic role of women, project's activities, etc.
Governmental agencies	High		Policies encouraging entrepreneurship (business development funds, lines of credit)
Women's groups			
International NGOs			

### CHECKLIST FOR THE PROGRAM IDENTIFICATION PHASE



- Gender issues within each component of the program have been identified along with the pertinent actions.
- A preliminary gender analysis in the program's area of intervention has been conducted.
- Analyses have been conducted of partners' openness to gender equality and donor agencies' interest in GE issues.
- The principal obstacles and success factors that may affect the fostering of GE have been identified.



# 2

SECTION

## PROGRAM PLANNING AND DESIGN

## 2: PROGRAM PLANNING AND DESIGN

### 2.1 Introduction

#### 2.1.1 Results-Based Management (RBM)

### 2.2 Developing a Gender-Sensitive Logic Model (LM)

#### 2.2.1 Gender-Sensitive Outcomes

#### 2.2.2 Example of a Gender-Sensitive Logic Model

### 2.3 The Performance Measurement Framework (PMF) and Gender-Sensitive Indicators

#### 2.3.1 Example of Gender-Sensitive Performance Measurement Framework (PMF)

### 2.4 Risk Register

#### 2.4.1 Example of a Response Strategy to Gender Equality Related Risks

#### 2.4.2 Other Examples of Gender Equality Risks and Mitigation Measures

### 2.5 Gender-Sensitive Budgeting

## 2.1 INTRODUCTION

During the program planning and design phase, the integration of GE is based on a gender analysis<sup>2</sup> as well as the data collected during the program identification phase. It's crucial that this information specify the respective priorities of women and men and moreover, that these priorities be reflected in the program's planning and design. This section will discuss how to successfully mainstream GE in several program management tools, particularly the ones used in results-based management.

### OBJECTIVES FOR THE PROGRAM PLANNING AND DESIGN PHASE

- Develop a gender-sensitive logic model, performance measurement framework and risk register.
- Develop GE specific outcomes and gender specific indicators.
- Identify GE related risks and identify mitigation measures.
- Develop a gender-sensitive budget to facilitate the effective implementation of GE considerations.

#### 2.1.1 RESULTS-BASED MANAGEMENT (RBM)

Results-based management (RBM) is a management approach favored by donors, including DFATD, the principal funding agency of Canadian ICOs. RBM entails the utilization of planning/program management tools, including the logic model (LM), the performance measurement framework (PMF) and the risk register. This management approach emphasizes achieving results, performance measurement, learning, adaptation and performance reporting.<sup>3</sup> RBM principles are to be applied over a program's entire life cycle.

#### 2.2 DEVELOPING A GENDER SENSITIVE LOGIC MODEL (LM)

According to DFATD, the logic model, "Sometimes also called a 'results chain,' [...] is a depiction of the causal or logical relationships between inputs, activities, outputs, and the outcomes of a given policy, program or investment."<sup>4</sup> The elaboration of a gender-sensitive logic model must therefore ensure that the program's outcomes contribute to reducing gender inequalities.<sup>5</sup> The elaboration of the LM – as well as that of the PMR and the risk register – should be a participatory process with input from many sources, including gender equality specialists, local stakeholders and beneficiaries.<sup>6</sup>

The logic model is a representation of the planning and design process that formulates the outcomes targeted by the intervention. According to DFATD's gender equality policy<sup>7</sup>, it is important to include clear, measurable and achievable outcomes for fostering GE, including at least one GE outcome ideally at every level of outcomes (final, intermediate and immediate). As for the activities proposed, they are the vehicles for achieving the outcomes specified in the logic model, including those specifically targeting GE.

<sup>2</sup> For more information on gender-based – or gender-specific – context analysis, see: AQOCI, Promoting Gender Equality: From Theory to Practice, March 2011, p.49.

<sup>3</sup> For more information, refer to the DFATD website: [http://www.international.gc.ca/development-developpement/partners-partners/bt-oe/rbm\\_tools-gar\\_outils.aspx?lang=eng](http://www.international.gc.ca/development-developpement/partners-partners/bt-oe/rbm_tools-gar_outils.aspx?lang=eng)

<sup>4</sup> Idem.

<sup>5</sup> CIDA, CIDA'S Framework for Assessing Gender Equality Results, 2010, p. 2.

<sup>6</sup> DFATD, 2013: [http://www.international.gc.ca/development-developpement/partners-partners/bt-oe/rbm\\_tools-gar\\_outils.aspx?lang=eng](http://www.international.gc.ca/development-developpement/partners-partners/bt-oe/rbm_tools-gar_outils.aspx?lang=eng)

<sup>7</sup> CIDA, CIDA's Policy on Gender Equality, Canada, 2010.



## AIDE-MÉMOIRE ON FORMULATING GE (OR GE MAINSTREAMING) OUTCOMES AND ACTIVITIES

<b>Ultimate outcome</b>	<ul style="list-style-type: none"> <li>Is the target group well identified (gender, age, socioeconomic status)?</li> <li>Is a GE dimension integrated into the ultimate outcome?</li> <li>Did women and men contribute to its definition in an equitable fashion?</li> <li>Does it reflect the needs and priorities of the women and men of the target region?</li> <li>How does the program foster improvements in the living conditions and social status of women and men in the target region?</li> </ul>					
<b>Intermediate outcomes</b>	<ul style="list-style-type: none"> <li>Is a GE outcome included (i.e. a specific GE intervention for example)?</li> <li>Do they reflect the needs and priorities of women and men of the target region?</li> <li>Do the outcomes integrate the GE dimension?</li> </ul>					
<b>Immediate outcomes</b>	<ul style="list-style-type: none"> <li>Are they gender sensitive?</li> <li>Is a GE outcome included?</li> </ul>					
<b>Outputs</b>	<ul style="list-style-type: none"> <li>Are they gender sensitive?</li> <li>Do women and men benefit equitably from the program's resources?</li> </ul>					
<b>Activities</b>	Have activities to promote GE been integrated into the program?	Have activities been planned to sensitize men and change their perceptions, behavior and attitudes regarding women's rights?	<p>Will the workload of women increase or decrease?</p> <p>Are the needs, possibilities and constraints of men and women taken into account?</p>	Do women and men have equal chances to participate in activities and benefit from them?	Are specific activities required to build partners' capacities to mainstream gender equality in their own organizations?	Do the planned activities involve equal participation of women and men?

## 2.2.1 GENDER-SENSITIVE OUTCOMES

A gender-sensitive outcome consists of a measurable change that explicitly aims to reduce gender inequalities.<sup>8</sup>

**Example of an outcome that does not take gender into consideration:**

- Improved access to water and sanitation services.

**Example of an outcome that does take gender into consideration:**

- Improved access to water and sanitation services that is also more gender equitable.

### EXAMPLES OF OUTCOMES FOR A GE SPECIFIC APPROACH:

Women's empowerment and women's rights<sup>9</sup>:

- Increase in women's capacity to express their specific needs and strategic interests.
- Increased self-confidence among women.
- Increase in women's abilities to exercise their rights and responsibilities as citizens.
- Increased knowledge of women's rights in the community and within the family.
- Greater autonomy of action in terms of defending rights.
- Greater enforcement of existing laws and practices those are favorable to gender equality.
- Increased sensitization of institutions and of persons in positions of authority regarding gender equality issues.
- Increased commitment on the part of local or national governments to respect women's rights and to respond to infringements on gender equality rights.
- Greater access to the judiciary for women.
- Improvements in women's legal status.
- Increased sensitization of the public on issues related to women's rights.
- Increased involvement of men and boys in the community in activities to combat violence against women and girls.

<sup>8</sup> Idem

<sup>9</sup> AQOCI, *La gestion axée sur les résultats (RBM) en lien avec l'approche Genre et développement (GED)*, Guide destiné aux organisations membres de l'AQOCI, 2008.

The participation of women and women's groups in public life<sup>10</sup>:

- Increased participation of women in decision-making and/or influential positions in democratic institutions and community management organizations.
- Increased influence of women and women's organizations in the community and with public authorities.
- Greater acceptance of women's leadership in communities.
- Improved visibility of women's organizations.
- Stronger women's organizations and networks.
- A more favorable environment to women's participation in public life and collective decision-making.

**EXAMPLES OF CROSSCUTTING GE OUTCOMES:**

Gender-sensitive economic development outcomes:

- Increased capacity of governments or institutions to develop gender-sensitive economic development policies.
- Greater access to vocational training and technical assistance for women.
- Greater access to non-traditional professions for women.
- Progress towards pay equity.
- Greater access for women to management positions in businesses.
- Improved balance between work and family life.
- More equitable access for women to land and land ownership.
- Productivity and incomes gains for women.
- Increased access to credit and business support services for women.
- More gender equitable decision-making authority within families regarding spending and investment matters.

Gender-sensitive outcomes in the infrastructure<sup>11</sup> and basic services sector:

- Greater access for women to adequate basic services (transportation, water, housing, education, etc.).
- Greater access for women to the training required to ensure infrastructure maintenance and management.
- Increased participation by women in infrastructure related decisions.

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<sup>10</sup> ACDI. GAR@I/ACDI, *Outils de référence rapide, Fiche conseil n°5 : Résultats et indicateurs en matière d'égalité entre les sexes.* (Non daté)

<sup>11</sup> OECD, DAC Network on Gender Equality, *Managing for Gender Equality Results in Donor Agencies*, 2009

- Shorter delays for access to services.
- Increased security, thereby ensuring access to services.

Gender-sensitive outcomes in the water and sanitation sector<sup>12</sup>:

- Increased participation by women in decisions on water supply and sanitation services.
- Improved and more gender equitable access to water supply and sanitation services.
- Enhanced consultation with women and women's organizations on the development and management of water supply and sanitation services.

Gender-sensitive outcomes in the health care sector<sup>13</sup>:

- Strengthened capacity of women to convince their partners to accept lower risk sexual relations.
- Increased and clear willingness of men to share in decision-making regarding women's reproductive health.
- Improvements in women's physical and psychological health.
- Women have greater control over their fertility.
- Reduction in cases of physical, sexual and psychological abuse.

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<sup>12</sup> Oxfam Québec. *L'intégration du genre dans le cycle des projets/programmes*. 2013.

<sup>13</sup> Rose Chege, *Gender Training of Trainers*, FEMNET, 2006

## 2.2.2 EXAMPLE OF A GENDER-SENSITIVE LOGIC MODEL

Ultimate outcome	1000 Improved living conditions for <u>women and men</u> in community X, Burkina Faso				
Intermediate outcomes	1100 Increase in sustainable water use by <u>women and men</u> in community X	1200 Greater participation by community X, <u>particularly women</u> , in efficient water management			
Immediate outcomes	1110 Increased access to water in community X via improvements in water supply systems	1120 Increased competencies among the local authorities (of both genders) in terms of developing water management plans in community X	1210 Increased competencies among <u>women and men</u> IN promoting responsible water consumption and conservation in community X	1220 Increased competencies among <u>women and men</u> IN ensuring sustainable water management	1230 <u>Increased access for women to water management decision-making bodies</u>
Outputs	1111 Rehabilitated wells and pumping stations in community X.	1121 Technical support on developing water management plans given to the local authorities	1211 Execution of <u>gender-sensitive</u> community sensitization campaigns on responsible water consumption and conservation	1221 Certified technical training sessions on water management developed and given to the <u>women and men</u> of community X	1231 <u>Enhanced leadership and water management capacities among the women of community X</u>
	1112 <u>Gender-sensitive impact assessments</u>	1122 Regular assessments of water needs and use, <u>including data broken down by gender</u> , to ensure informed water management		1222 Designing of <u>gender sensitive</u> tools (manuals) in terms of content, illustrations, non-sexist language, etc.	1232 <u>Gender training sessions developed and given to local authorities</u>
Activities	1111 Rehabilitate wells and pumping stations	1121 XXXXX	1211 XXXXX	1221 XXXXX	1231 XXXXX
	1112 Conduct <u>gender-sensitive impact assessments</u>	1122 XXXXX		1222 Design <u>gender-sensitive</u> training tools	1232 XXXXX



## 2.3 THE PERFORMANCE MEASUREMENT FRAMEWORK (PMF) AND GENDER-SENSITIVE INDICATORS

The PMF is a RBM tool used to monitor progress in achieving outcomes via systematic data collection throughout the life of a program. It is based on the logic model.

### Gender-sensitive indicators

**Performance indicators** enable the measuring of gender-sensitive outcomes, i.e., they measure the changes produced in gender relations or in the status of women over a given period. Indicators of immediate, intermediate and ultimate outcomes must be identified to measure the changes and/or improvements that occur over time during a program. Specific indicators to measure progress in achieving gender equality must be defined as such indicators are integral to the evaluation of a development program.<sup>14</sup> Moreover, to this end it is important to use both qualitative and quantitative indicators. Qualitative indicators are more concerned with measuring **changes** in terms of perceptions, empowerment and favorable appreciation.

### EXAMPLES OF GENDER-SENSITIVE QUANTITATIVE INDICATORS<sup>15</sup> FOR A GE SPECIFIC INTERVENTION

- Number of tools and mechanisms put in place to ensure equality.
- Percentage of annual budget invested in GE.
- Number and type of stakeholders mobilized on GE during outreach and visibility activities.
- Number of persons trained in GE.
- Number of partnerships put in place to promote GE.
- Number of women and men with access to resources.
- Number of women and men with control over resources.
- Number of incidents of violence against women reported in the community.<sup>16</sup>
- Number of women and men with access to information.
- Number of women who believe that they have greater self-confidence.
- Number of women with better access to legal information.
- Number of women with access to public spaces.
- Number of women in the labor market.
- Number of women and men among beneficiaries.<sup>17</sup>
- Participation rates of women and men in activities.
- Number of trainings given by persons trained in GE over life of the program.

<sup>14</sup> AQOCI. *Promoting Gender Equality*, p. 57.

<sup>15</sup> Agence Fonds Social Européen de la Communauté française, *Intégrer la dimension de « genre » dans les projets EQUAL : un guide pratique à l'usage des promoteurs*, 2003; Rose Chege, *Gender Training of Trainers*; AQOCI, *Promoting Gender Equality*, p. 57.

<sup>16</sup> AQOCI. *Promoting Gender Equality*, p. 57.

<sup>17</sup> This is dependent on the composition of the project's target group.

## EXAMPLES OF QUALITATIVE INDICATORS

- Satisfaction rates of women and men in relation to GE trainings.
- Degree of ownership of knowledge acquired.
- Rate of increase in and number of stakeholders and key actors who implemented a GE action plan.
- Perceptions of women and men in the target group concerning gender inequalities in their community.
- Number of good practices or mechanisms put in place to institutionalize GE issues.
- Diversity of career options for women and men.
- Level of women's satisfaction regarding their capacity to satisfy their needs autonomously.

Expected results	Performance indicators	Baseline data	Targets	Data source	Data collection methods	Frequency	Responsibility
<b>Ultimate outcome</b>							
<b>Intermediate outcomes</b>	Have indicators been developed to measure progress on GE?	Has baseline data been provided for each performance indicator?	Specific targets to be achieved before a given date. Must be realistic and regularly reviewed.	E.g., persons or documents Ex. People (men and women) or documents. * Avoid indicators based on household data, which can render invisible the needs and priorities of women. Men are often the chosen responder for the household.	E.g., Surveys, observation, interviews. Ensure spaces for women respondents to answer more freely (women only groups, interviews vs estionnaires for literacy concerns, absence of husbands during interview...)	E.g., Annually, at program mid way point and at end of program. When programming data collection, consider women's daily schedule and seasonal calendar.	E.g., Program manager
<b>Immediate outcomes</b>	Are these broken down by gender?	Has it been broken down according to the relevant categories and collected for the most marginalized women/girls and men/boys?	Did partner stakeholders (of both genders) participate in their elaboration?				
<b>Outputs</b>	Have both quantitative and qualitative indicators been developed?						

<sup>18</sup>AQOCl. Guía: La Gestión axée sur les résultats (GAR) en lien avec l'approche Genre et développement (GED).

### 2.3.1 EXAMPLE OF GENDER SENSITIVE PERFORMANCE MEASUREMENT FRAMEWORK (PMF)

EXPECTED RESULTS (derived from logic model)	INDICATORS	DATOS BÁSICOS	TARGETS	DATA SOURCES	DATA COLLECTION METHOD	FREQUENCY	RESPONSABILITY
ULTIMATE OUTCOME							
1000 Improved living conditions for women and men of community X in Burkina Faso							
INTERMEDIATE OUTCOMES							
1100 Increases in water use by the women and men of community X	Number of women and men making better use of water for human consumption throughout the year	X women X men	X women X men	Women and men of community X Water management committees Local authorities	Home visits Village meetings for women Interviews with the water management committees and local authorities	3 times/year 2 times/year 2 times/year 4 times/year	
	Number of women and men making better use of water for economic production activities throughout the year	X women X men	X women X men	Farmers of both genders Entrepreneurs of both genders who carry out activities that use water	Home visits Trips to farmers' fields, grazing areas, mills, etc.	3 times/year 3 times/year	
	Women's and men's satisfaction rates regarding water use		80% satisfaction rate, including 70% satisfaction rate for women	Women and men of community X Water management committees Local authorities	Home visits Village meetings Special meetings for women Interviews with the water management committees and local authorities	3 times/year 2 times/year 2 times/year 4 times/year	
1200 Greater participation of community X, particularly women, in efficient water management	Number of women and men participating in water management committees		60% of water management committee members are women	Members of the water management committees Local authorities	Interviews with the water management committees and local authorities	4 times/year	
	Percentage of water management committees chaired by women		50% of water management committees are chaired by women	Members of the water management committees Local authorities	Interviews with the water management committees and local authorities	4 times/year	
	Percentage of persons (gender disaggregated) who say they've improved their water management skills		70 %	Women and men who participated in trainings Trainers	Training workshop reports	At end of each workshop and 6 months later	

EXPECTED RESULTS (derived from logic model)	INDICATORS	DATOS BÁSICOS	TARGETS	DATA SOURCES	DATA COLLECTION METHOD	FREQUENCY	RESPONSIBILITY
IMMEDIATE OUTCOMES							
1110 Increased access to water via improved water supply systems in community X	Number of improved systems						
1120 Local authorities are more capable of developing water management plans in community X							
1210 Women and men are better equipped to promote responsible water consumption and conservation in community X	Percentage of persons (women and men) who consider themselves able to promote sustainable water consumption in their communities		Percentage of women Percentage of men				
1220 Women and men have enhanced sustainable water management skills	Percentage of persons (women and men) who consider themselves able to manage water resources		Percentage of women Percentage of men				
1230 Increased access for women to water management decision-making bodies	Number and percentage of women (compared to men) elected to the water management committees						
OUTPUTS							
1111 Rehabilitated wells and pumping stations in community X	Number of wells drilled						
	Number of pumping stations rehabilitated						
1112 Completed gender analyses and gender-sensitive impact assessments	Number of gender analyses done		2 gender analyses completed				
	Frequency of gender-sensitive impact assessments		1 assessment per quarter				
1121 Technical support given to local authorities to develop water management plans							
1122 Regular water needs and use assessments, with data broken down by gender, to inform water management committees.							

EXPECTED RESULTS (derived from logic model)	INDICATORS	DATOS BÁSICOS	TARGETS	DATA SOURCES	DATA COLLECTION METHOD	FREQUENCY	RESPONSABILITY
1211 Gender-sensitive community awareness campaigns on responsible water consumption and conservation are carried out	Number of campaigns conducted		3 campaigns carried out, including one bearing on issues specific to women				
	Number of persons sensitized by the campaigns						
1221 Certified technical training on water management is developed and given to the women and men of community X	Number of women and men who received technical training on water management		60% of women and 40% of men				
1222 Design of tools (manuals) that are gender sensitive (content, illustrations, non-sexist language)	Number of gender-sensitive tools designed		At least 3 tools				
	Percentage of women who indicate they've strengthened their leadership capacities						
1231 Strengthened leadership and water management capacities among the women of community X							
	Number of gender trainings developed and given		At least 2 trainings per year				
1232 Gender trainings are developed and given to the local authorities	Satisfaction rate of local authorities concerning the gender trainings given		80% satisfaction rate (gender disaggregated)				

## 2.4 RISK REGISTER

It's also important to take gender equality risks into account prior to program implementation, as this enables developing mitigation strategies from the very outset. The analysis of potential obstacles and resistance, whether in terms of national policies and laws, cultural practices or even the capacity of partner organisations facilitates the creation of locally adapted strategies.

### 2.4.1 EXAMPLE OF A RESPONSE STRATEGY TO GENDER EQUALITY RELATED RISKS

<b>1. Risk (definition)</b> <i>(Risks that influence achievement of results)</i>	<b>2. Risk attenuation</b> <i>(Proposed mitigation measures/actions)</i>	<b>3. Outcomes as per the project's LM</b> <i>(State the expected results associated with this LM risk)</i>	<b>4. Residual risk</b> <i>(On a scale of 1 to 4, where 1 represents very low risk and 4 very high risk, indicate the impact of each risk and its probability of occurring; this column should reflect level of risk following application of the response identified in column 2)</i>
Risk of resistance from men and local authorities concerning the leadership role of women in water management.	<p>Gender trainings are developed and given to men and local decision-making authorities.</p> <p>Joint work sessions of local authorities and women's groups are organized to promote dialogue and mutual understanding.</p> <p>Concrete actions are taken to ensure that women's voices are heard as much as men's are during mixed committee meetings (e.g., rules ensuring that all may speak in turn).</p>	1230 Greater access to water management decision-making bodies for women.	Impact: 2  Probability: 3
<b>Initiative's overall level of risk:</b> explain, in a brief paragraph, your assessment of overall risk and emphasize the underlying reasons for this assessment.			<b>Assessment of remaining overall risk</b> (from 1 to 4), in accordance with assessment of overall risk):

## 2.4.2 OTHER EXAMPLES OF GENDER EQUALITY RISKS AND MITIGATION MEASURES

Gender Stand-Alone Approach: Program of Women's Economic Empowerment	
RISK	MITIGATION MEASURES
<ul style="list-style-type: none"> <li>Reluctance of banking institutions to facilitate access to credit for women in rural areas, especially for businesses managed by women.</li> </ul>	<ul style="list-style-type: none"> <li>The program supports partner organizations in developing awareness raising strategies targeting financial institutions to promote changes lending policies and practices.</li> </ul>
Crosscutting example: HIV-AIDS prevention program	
RISK	MITIGATION MEASURES
Certain sexist and discriminatory beliefs and attitudes may hinder changes in behavior in relation to the reproductive health of women, men and youth.	<ul style="list-style-type: none"> <li>The program mobilizes its partners in support of the planned communications campaign: workshops, discussion forums, visual materials, public debates, the media (TV and radio), etc.</li> <li>Train and sensitize community organizers on the sources of resistance, possible solutions and ways of steering around the principal obstacles.</li> </ul>
RISK	MITIGATION MEASURES
Certain sexist and discriminatory beliefs and attitudes may block the integration of women into the program.	<ul style="list-style-type: none"> <li>Develop crosscutting and specific strategies to promote the effective and egalitarian participation of both women and men.</li> <li>Train and sensitize the program's principal partners on the gender equality approach and ensure its application in practice.</li> <li>Ensure the presence of a GE specialist on the permanent staff for the duration of the program.</li> <li>Target women and children as the principal beneficiaries. Use on line performance measurement indicators to enable monitoring.</li> </ul>



## 2.5 GENDER-SENSITIVE BUDGETING<sup>19</sup>

A program with gender-sensitive budgeting facilitates the integration of GE issues. How, then, is gender to be integrated into the budget?

### WITH A CROSSCUTTING APPROACH

- Budget all material, human and financial resources required to adequately address the needs identified during the gender analysis.
- Ensure parity in terms of salary, recruitment and training opportunities.
- Integrate expenditures on activities to build the capacities of the program's partners to ensure gender integration.

### BY BUDGETING FUNDING FOR SPECIFIC GE ACTIVITIES

- Insert budget items to fund capacity-building activities for women.
- Include budget items on GE trainings for staff members.
- Budget the recruitment of specialized GE resources.
- Include budget items to cover GE data analysis and research.
- Budget significant funds to ensure the documentation and dissemination of GE experiences (best practices, lessons learned, etc.).

### CHECKLIST FOR THE PROGRAM PLANNING AND DESIGN PHASE



- Gender-sensitive outcomes and/or outcomes that specifically target GE have been integrated into the logic model.
- Gender specific indicators have been developed in the performance measurement framework.
- Targets promoting women's needs and interests have been integrated into the performance measurement framework.
- The risks in relation to Gender equality have been identified.
- Mitigation measures in response to GE related risks have been elaborated.
- Financial resources have been set aside to implement GE specific activities and recruit specialized resources.

<sup>19</sup> AQOCI, *Promoting Gender Equality*, Oxfam-Québec, *Outil 8, Budget sensible au genre*.

# 3 SECTION

## PROGRAM IMPLEMENTATION





## 3: PROGRAM IMPLEMENTATION

### 3.1 Introduction

### 3.2 Components to consider during Program Implementation

#### 3.2.1 Participation of Stakeholders

#### 3.2.2 The Gender Strategy

#### 3.2.3 Results Based Management Tools

#### 3.2.4 The Program Implementation Plan

#### 3.2.5 Stakeholders and partner training

#### 3.2.6 Program Outreach and Communication

#### 3.2.7 Management and Human Ressources

### 3.1 INTRODUCTION

Program implementation is essentially the execution of programmed activities in order to achieve targeted outcomes. Effective planning generally leads to more effective implementation. The contents of this section are based on the assumption that the GE components presented in the preceding sections have been validated or adapted, as required.

In the event that information on the specific status of women is incomplete at this stage, the start of program implementation would represent an opportune moment to update the program's contextual

#### OBJECTIVES FOR THE PROGRAM IMPLEMENTATION PHASE

- Update the program's contextual analysis while integrating a GE perspective.
- Implement the methodological tools developed during the program planning and design stage and adapt them to the updated contextual analysis and objectives.
- Develop the program's GE strategy.
- Elaborate a gender-sensitive implementation plan.
- Integrate and strengthen stakeholders' GE competencies.

### 3.2 COMPONENTS TO CONSIDER DURING PROGRAM IMPLEMENTATION

With respect to program implementation, six different components will be presented to ensure more inclusive mainstreaming of gender issues.

#### 3.2.1 PARTICIPATION OF STAKEHOLDERS

Elaborating a GE strategy, in the context of program implementation, amounts to ensuring the principle of **evaluating the participation** of women and men in all planned activities (*legislation, procedures or programs*), in all areas and at all levels. In this way, a GE strategy enables **the integration of the concerns and experiences** of women and men at every stage of the program and in every sphere (political, economic and social) so that women and men benefit equally and existing inequalities are not perpetuated. Moreover, it's at the strategic level that one may consider integrating the issue of masculinity. The objective: addressing directly the **process of men constructing male identities** – a process that necessarily implies **more concrete work *with and on* men** with a view to changing unequal social relations.

The GE strategy facilitates determining how the program will globally address gender inequality.

### 3.2.2 THE GENDER STRATEGY

**Methodologically:**

- the GE strategy is to be developed in parallel with the logic model and the performance measurement framework; and
- It is to be developed as a function of the identified target group and the results of the context gender analysis.

**Specifically, the strategy must contain:**

- A concise presentation of the program;
- An explanation of why it is necessary to integrate a GE strategy;
- An explanation of the pedagogical approach regarding integration of the concept of “masculinity” (as required);
- A brief summary of your (updated) gender-sensitive context analysis;
- Explanatory notes regarding gender mainstreaming in all planning tools, as well as in the project/program description;
- A presentation of the mechanisms ensuring that all program stakeholders have a sensitivity to GE issues and an understanding of them in relation to their own management practices and operations;
- A presentation of the procedures ensuring that management structures and tools reflect GE principles in theory as well as in practice;
- Explanatory notes regarding the means that will serve to ensure that project/program promotional and communications activities mainstream gender issues; and
- A summary of the methodology used to monitor and evaluate the implementation of this GE strategy (e.g., hiring a resource specializing in GE, setting up a monitoring committee, development of monitoring tools, etc.).

### 3.2.3 RESULTS BASED MANAGEMENT TOOLS

The logic model, performance measurement framework and risks register must be gender sensitive and updated in accordance with the condition and status of women. Consequently, it is important to analyze whether situations affecting women in particular have emerged (intensification of violence, new programs implemented in the target zone or with target populations, implementation of new public policies, etc.).

### 3.2.4 THE PROGRAM IMPLEMENTATION PLAN

As a mandated requirement of the donor agency, the project implementation plan is elaborated following the signing of the funding agreement. Consequently, it's important to ensure that the PIP is gender sensitive. In effect:

- Outcomes and indicators must be gender sensitive, and should reflect the condition and status of women in the program country.
- Indicators must be gender sensitive and updated in accordance with the conditions and present status of women and men;
- The initial baseline data and program targets must be gender sensitive and reflect the condition and status women in the program country.
- Indicators must be gender sensitive and updated in accordance with the conditions and present status of women and men;

### 3.2.5 STAKEHOLDERS AND PARTNER TRAINING

- Ensure that local authorities, spouses, family members, friends and neighbors are informed about and sensitized on GE issues. Ensure (via diverse strategies) their support for encouraging the participation of both women and men in program activities.
- Identify local resources (service providers, government agencies, NGOs, associations, independent consultancies) to involve them in raising awareness of GE issues among their personnel as well as with the general public.
- In the absence of such structures, identify what networks or working groups need to be created to facilitate dialogue between the program and partner organizations (NGOs, women's groups and youth organizations) to promote greater consideration of GE issues.
- Ensure that the hiring policy is equitable for women and men (and, if the context is favorable, promote a policy to encourage hiring women in managerial and non-traditional positions).
- Familiarize program personnel with the GE issues affecting the program's target community.
- Ensure that personnel are equipped with the competencies required to consider GE issues in the exercise of their tasks and responsibilities.
- Program specific trainings to support personnel regarding active awareness of GE issues in relation to their tasks and responsibilities.
- Ensure that personnel performance appraisals take into account attitudes of staff members concerning GE issues.

### 3.2.6 PROGRAM OUTREACH AND COMMUNICATION

- Give visibility to the particular contribution women make to the program, the outcomes achieved for women and the changes observed.
- Analyze the program's promotional tools (posters, brochures, photos) to ensure that they are equitable in their representation of women and respectful of the image of both women and men.
- Ensure that all communications, information and training strategies and tools intended for beneficiaries are appropriate, accessible and easily understood by both women and men.

### 3.2.7 MANAGEMENT AND HUMAN RESSOURCES

- Ensure that women are well represented and occupy active roles with responsibilities in the program's various committees (management committee, monitoring and evaluation, etc.).
- Ensure that the allocation of roles and responsibilities arising from the program's activities does not perpetuate certain traditional roles that foster gender inequalities.

- Mainstream gender concerns into the terms of reference for the procedures manual.
- Ensure that the job descriptions and responsibilities of team members clearly reflect the pertinent GE implications.
- Ensure that the implementation team has at its disposal the tools needed to ensure ongoing GE integration, as well as assess progress of activities in terms of the GE approach. Such tools shall include the results of GE issues impact assessment studies, computerized tools to track indicators (broken down according to gender), information and training manuals, etc.
- Ensure that the implementation team has at its disposal the necessary material and human resources (at the coordination team level and in the field) to carry out training, information and facilitation activities on GE issues. Ensure that the program implementation team includes a GE specialist.
- Regarding the organizing of exchange visits, put in place equitable measures to ensure that women may truly participate despite impediments related to their higher illiteracy rates (obtaining visas, vaccination certificates and passports) and social constraints (rites, customs, resistance of spouses, domestic responsibilities, etc.).

## CHECKLIST FOR THE PROGRAM'S IMPLEMENTATION PHASE



- The GE strategy was developed by all stakeholders. They are familiar with it and they fully understand it.
- The logic model, performance measurement framework and risks register (which must all be gender sensitive) have been updated to reflect the existing conditions and present status of women and men.
- The project implementation plan is gender sensitive.
- Measures have been taken to ensure that all program stakeholders enhance their sensitivity to and understanding of GE issues, as well as their capacities to mainstream gender issues into management practices and operations.
- The GE approach is integrated into the program's promotional and communications strategies and tools.
- The program's management structures reflect GE principles in theory and in practice.
- The program's management tools reflect GE principles in theory and in practice.



# **4** **SECTION** **MONITORING AND EVALUATION**



## 4: MONITORING AND EVALUATION

### 4.1 Introduction

### 4.2 Integrating Gender Equality (GE) in Monitoring and Evaluation

#### 4.2.1 The Monitoring and Evaluation Team

#### 4.2.2 The Evaluation’s Terms of Reference

#### 4.2.3 The Implementation of Monitoring and Evaluation

#### 4.2.4 The Methodology (data collection)

#### 4.2.5 The Monitoring and Evaluation Report

## 4.1 INTRODUCTION

Monitoring and evaluation must refer at all times to 1) the baseline situation established at the very beginning of the programming cycle via the collection of baseline data, 2) the performance measurement framework and 3) the results of the gender-sensitive contextual analysis.

*Monitoring* is a **continuous activity that consists of verifying a program's progress, according to data collection and analysis, allowing for program adjustments.** *Evaluation* is an analytical process that enables the **systematic and objective assessment of a project after its completion.** It generally concerns an assessment of the program strategy, implementation and the outcomes obtained. It should emphasize both outcomes and process, which facilitates the identification of good and bad practices.

Evaluation that integrates GE issues utilizes traditional assessment criteria (relevance, effectiveness, efficiency, impact, sustainability), but with a greater focus on persons and processes than on activities per se.<sup>20</sup> consequently, broad participation by women and men in the evaluation process is crucial to an evaluation that is sensitive to GE issues. Mainstreaming GE in evaluations may seem more complex when external actors are chosen to conduct the evaluation. It is therefore especially important that you inform the program assessment team of your concerns in relation to GE.

### OBJECTIVES OF GENDER SENSITIVE MONITORING AND EVALUATION

- ***GE sensitive monitoring objectives***
  - Verify the project's outcomes regarding gender relations and their evolution.
  - Ensure ongoing gender mainstreaming in the program's principal activities and achievements.
  - Ensure the equitable utilization of resources by women and men for the duration of the program.
  - Ensure the active participation of women and men in the program's activities.
  - Integrate, if necessary, new gender related activities specifically targeting women or men.
  - Revalidate the GE strategy and update it if necessary.
- ***GE sensitive evaluation objectives***
  - Identify and analyze the program's GE outcomes and impacts.
  - Formulate specific recommendations in relation to GE issues.
  - Draw lessons from the experience, highlight expertise acquired and disseminate good GE practices.

<sup>20</sup> IFAID Aquitaine. *Prise en compte des approches du genre dans les interventions de développement : Outils méthodologiques et fiches pratiques*. 2001.

## 4.2 INTEGRATING GE IN MONITORING AND EVALUATION<sup>21</sup>

### 4.2.1 THE MONITORING AND EVALUATION TEAM

- Does the monitoring and evaluation team have the necessary expertise (i.e., at least one GE specialist) to address GE questions in general and in the program's specific areas of intervention?
- Does the monitoring and evaluation team include women and men occupying positions with comparable decision-making responsibilities?
- Are GE related responsibilities shared and understood by all members of the team?
- Do the evaluators dispose of adequate tools to measure the progress of GE related activities and outcomes?

### 4.2.2 THE EVALUATION'S TERMS OF REFERENCE

- Are the terms of reference gender sensitive, especially when considering the design and execution of monitoring and evaluation activities?
- Do the terms of reference highlight the need to develop gender sensitive indicators and to collect gender disaggregated data and qualitative data from women as well as men.
- Do the terms of reference include reference to indicators that measure change in gender relations, the status of women and the empowerment of women.<sup>22</sup>
- Do the terms of reference specify an assessment of the levels of participation in the program by women and men?
- Do the terms of reference specify the monitoring and evaluation of outcomes targeting gender equality issues?

### 4.2.3 THE IMPLEMENTATION PHASE OF MONITORING AND EVALUATION

- Do monitoring and evaluation activities facilitate analysis of whether existing partnerships, alliances or collaborations are suitable with respect to integrating GE issues? Is there a shared commitment?
- Do monitoring and evaluation activities analyze financial aspects to ensure that funds allocated to GE issues are properly utilized?
- Do monitoring activities include analysis of the capacity of field teams or village management committees to ensure that gender parity is respected during the implementation of activities?
- Do GE related monitoring and evaluation activities focus on program content as well as implementation?
- Do monitoring and evaluation activities make it possible to determine the program's desired and/or undesirable effects on gender equality?

<sup>21</sup> List adapted from the DDC. *Fiche 12 Genre et l'évaluation* 2004; and Oxfam-Québec, *Outil 6 – Suivi de la mise en œuvre, Boîte à outils « le genre dans nos programmes »*, 2011.

<sup>22</sup> AQOCI, Promoting Gender Equality: <http://www.aqoci.qc.ca/spip.php?rubrique226>, 2011.

- Do monitoring and evaluation activities enable analysis of whether the program's positive impacts/benefits are allocated equitably between women and men and whether they meet the strategic as well as practical needs of women and men?
  - Do emerging outcomes of the program contribute to expanding GE regarding:
    - Participation in the life of the community;
    - Equitable sharing of everyday domestic work;
    - Access to and control over resources within the family, the community and businesses;
    - Access to and control over the program's "products";
    - Women's empowerment/leadership;
    - Changes in the attitudes of men and women concerning sharing power and decision-making; and
    - Changes in perceptions regarding individual rights (free speech, freedom of movement, control of one's body, etc.)?

#### 4.2.4 THE METHODOLOGY (DATA COLLECTION)

- Do methodologies chosen take into consideration the barriers to women's participation: their lesser mobility, the need for spouse's permission, the scheduling of meetings at convenient times for women, etc.
- Do the methodologies chosen favor women's participation in data collection? Are women more at ease answering a questionnaire or participating in a group discussion? In mixed groups or in women-only groups? And what if her spouse is present during the interview? Can the gender of the interviewer affect the comfort level of women respondents?
- Do women participate in the process? Are they consulted and do they participate in results analysis?
- Has a space been planned to enable women and men to draw lessons from GE related interventions and issues?

#### 4.2.5 THE MONITORING AND EVALUATION REPORT

- Does the report expressly state how GE was integrated into the evaluation methods?
- Has the data collected (during monitoring and evaluation) been broken down according to gender and do they facilitate:
  - Analysis of the respective contributions made by women and men?
  - Gender sensitive analysis of program outcomes?
  - Identification of differences and similarities, potential conflicts, and current and potential forms of collaboration?
- Are both quantitative and qualitative indicators used to measure GE progress?
- Are gender-sensitive indicators being used to evaluate the program's impact on women and men?
- Is the text written in a manner that excludes neither gender and is it free of sexist language or stereotypes?

- Have equitable mechanisms to ensure the sustainability of the program's positive impacts been identified?
- Does the report make recommendations on the activities to be undertaken to guarantee gender mainstreaming?
- Are gender mainstreaming practices analyzed and disseminated?
- Do the results of the evaluation (i.e. the impact assessment study of the program regarding GE issues) lend themselves to the presentation and dissemination of lessons learned, along with the recommendations, in connection with the program's GE strategy?

#### CHECKLIST FOR THE MONITORING AND EVALUATION PHASE



- The monitoring and evaluation team has GE expertise and the tools necessary to fulfill their mandate.
- The evaluation's terms of reference specify the need for gender sensitive indicators, gender disaggregated data, specific and cross cutting gender results.
- Monitoring and evaluation activities measure whether program benefits, resources and decision-making powers are allocated equitably between women and men.
- The GE strategy and its application have been evaluated.
- Measures are included to analyse financial budgets and financial reports, to ensure that funds allocated to GE are properly utilized.
- Methodologies are chosen or adapted to ensure the full participation of women.
- The monitoring and evaluation report is written in a manner that excludes neither gender and is free of sexist language or stereotype.
- The report includes GE recommendations and lessons learned.

# 5 **SECTION** LEARNING



## 5: LEARNING

### 5.1 Introduction

### 5.2 Methods and Tools for Learning

#### 5.2.1 Methods

#### 5.2.2 An Example of a Capitalization and Systemization Tool: The Good Practices Form

#### 5.2.3 An Example of a Participatory Action Research Tool: The Post-Action Review and Reflection



## 5.1 INTRODUCTION

Learning is not a “stage” in program management as such. Rather, we refer to it in the spirit of a “learning organization”, an organizational culture that facilitates the learning of its members and emphasizes continuous improvement. In any event, learning is very closely connected with monitoring and evaluation.

Throughout a program’s various stages – planning, implementation, monitoring and evaluation – it is essential to draw lessons. This makes it possible to identify best practices, meet challenges more effectively and improve program implementation now and in the future.

Regarding GE specifically, learning can take place on two different levels:

**Via a crosscutting approach:** by ensuring that the GE dimension is integrated into the program’s general learning process. For example, by ensuring the use of gender disaggregated data in documentation practices, by identifying the different realities specific to women and men, etc.

**Via a specifically targeted approach:** by focusing learning specifically on GE, whether this concerns a general program or a GE specific program. GE specific learning could for example concern a program’s main issues, its beneficiaries, its approach, etc.

It would be advisable **at the very outset** of a program to take a moment to establish how learning processes will be identified. Although it is never too late to initiate a learning process, the sooner it is undertaken in a systematic manner, the more one learns.

### OBJECTIVES OF THE OF THE LEARNING PHASE

- Develop a gender sensitive learning approach.
- Adapt learning methods and tools for gender sensitive learning processes.
- Identify principal success factors and obstacles that can affect the promotion of gender equality.
- Identify lessons learned and best practices linked to GE specific or crosscutting approaches.

#### A few definitions:

The notion of learning encompasses “a process of reflection that enables the interpretation of lived experiences, and, more specifically, intervention strategies and change processes, in order to identify the catalysts and obstacles to obtaining results, as well as good, bad and new ways of doing things.”<sup>23</sup>

A **learning organization** is one which, as part of its own development, proactively acquires the means to capitalize on its achievements, draw appropriate lessons, exchange on strategic issues and institute a process of continuous improvement.<sup>24</sup>

**Knowledge management** consists of the processes instituted by an organization to create, document, manage, share and apply knowledge to achieve its strategic objectives.<sup>25</sup>

<sup>23</sup> [https://oxfam.qc.ca/sites/oxfam.qc.ca/files/GRIOT\\_OAI.pps](https://oxfam.qc.ca/sites/oxfam.qc.ca/files/GRIOT_OAI.pps)

<sup>24</sup> *Ibid.*

<sup>25</sup> <http://www.gestiondesconnaissances.be/definir.php>

## 5.2 METHODS AND TOOLS FOR LEARNING

### 5.2.1 METHODS

#### Participatory action research:

Participatory action research methods are designed and carried out by and for stakeholders. They aim to identify good practices, the challenges to be met and the solutions to problems. They are also designed to evaluate outcomes and the process of change. Systematic data collection must be organized in a manner that includes several reliable and pertinent sources of information. GE may be integrated into data collection in a crosscutting fashion or via an issue that specifically addresses GE.

#### The capitalization or systemization processes:

**Systemization** is a learning method that consists of elaborating a model intervention strategy based on the elements emerging from the analysis of a development experience.<sup>26</sup>

**Capitalization:** once identified and documented, lessons may be capitalized on, i.e., utilized in order to better plan and manage future programs.

The stages in a capitalization or systemization process are as follows:

- 1- Identify one or more subjects to be capitalized or systemized, e.g., an outcome, process, innovation, etc.
- 2- Identify the stakeholders and sources of information.
- 3- Determine the roles and responsibilities of stakeholders, men, women, etc.
- 4- Review the literature as preparation – obtain as much information as possible on the subject to be capitalized (reports, tools developed, policies, sectoral analyses, etc.).
- 5- Conduct interviews with stakeholders (via a questionnaire, a focus group, informal interviews, etc.). It's good to have a basic questionnaire while also allowing for spontaneity via follow-up questions. Ensure equitable gender representation among interview subjects.
- 6- Analyze the information collected; identify the best practices, challenges and lessons learned. Identify contextual and one-off factors, as well as elements of consensus. The analysis will be influenced by the extent to which GE was a crosscutting issue or a specifically targeted one.
- 7- Present research results in the most appropriate form, i.e., as a report, good practices form, poster, etc. (see below).
- 8- Validate the research results with stakeholders (women and men) during stakeholder validation or feedback activities. prácticas, afiche con ilustraciones, etc. (Véanse ejemplos más adelante).
- 9- Validar los resultados de la investigación con las partes interesadas (mujeres y hombres) durante actividades de validación o retroalimentación.
- 9- Utilizar las informaciones recolectadas para mejorar las prácticas del programa que se encuentre en proceso de implementación o cualquier otro.

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<sup>26</sup> Oxfam-Québec, Glossaire, 2009.

### 5.2.2 EXAMPLE OF CAPITALIZATION AND SYSTEMIZATION TOOLS: THE GOOD PRACTICES FORM

When analyzing a process, the good practices form is a useful tool for summarizing information. It facilitates a quick recap of the process that led to the good practice and identifies the relevant success factors. This tool may be adapted for use with either GE specific analyses or crosscutting analyses.

GOOD PRACTICES FORM	
<p align="center"><b>Title of the good practice:</b></p> <p align="center">Increased women's participation in the municipal government of Kaolack, Senegal (fictitious project)</p>	
MERITS OF THE GOOD PRACTICE	VOICES OF STAKEHOLDERS
<p>(THE REASON WHY)</p> <p>Since 2010, Senegal has committed to achieving gender parity in terms of women's participation in democracy. In the community of Kaolack, Senegal, few women were active in municipal government. In 2010, women accounted for just 5% of municipal elected officials. In addition to being under-represented, women were unable to speak in meetings or to assume significant responsibilities.</p> <p>Since 2011, the "Project to Reinforce Municipal Governance" (PRGM) has supported elected officials, in particular women, to enable them to play a greater role in the community's municipal governance. Following the municipal elections of 2014, 25% of those elected to office were women. Although more progress is needed to attain effective parity, there has been a marked improvement in women's participation.</p>	<p>(CONFIRME L'IMPORTANCE DE LA BONNE PRATIQUE)</p> <p><b>Témoignage # 1</b></p> <p><i>«Avant, la parole des femmes ne comptaient pas dans les débats des élus municipaux. Maintenant, quand une femme parle, nous l'écoutons.»</i></p> <p>Papa Abdoulai Seck, maire de Kaolack</p> <p><b>Témoignage # 2</b></p> <p><i>«Depuis que j'ai reçu des formations, notamment sur la prise de parole et la place des femmes en démocratie, je me sens plus en confiance.»</i></p> <p>Mme Fall, conseillère municipale élue en 2014</p> <p><b>Témoignage # 3</b></p> <p><i>«Maintenant, je comprends bien que ma femme peut occuper un emploi tout en prenant soin de la famille. Nous avons partagé certaines tâches domestiques pour lui libérer du temps. Je sais qu'elle représente bien les besoins de ma communauté.»</i></p> <p>Mr Badji, époux d'une conseillère municipale élue en 2014</p>
THE PROCESS	GOOD PRACTICES
<p>(THE STEPS TO FOLLOW FOR THOSE - INDIVIDUALS, DONOR AGENCIES, MANAGERS, ETC. - WISHING TO REPLICATE THIS GOOD PRACTICE)</p> <ol style="list-style-type: none"> <li>1. Do a study on the status of women and their presence on the municipal scene (statistical analysis, role of women already elected to office, the community's perception of women's place in politics, analysis of obstacles and favorable factors re women's participation, etc.).</li> <li>2. Identify needs regarding the promotion of women's contributions in politics and increasing their participation in political life.</li> <li>3. Carry out a series of pre-election trainings and workshops for the community's male and female elected officials and women's associations.</li> <li>4. Develop promotional tools (posters, flyers) and use the media (radio, local newspapers).</li> <li>5. Carry out post-election trainings and workshops with male and female elected officials.</li> </ol>	<p>(IN ADDITION TO THE PROCESS, THERE ARE THE PRACTICES RELATED TO PROJECT/PROGRAM IMPLEMENTATION AS SUCH, WHICH FACILITATED THE GOOD PRACTICE)</p> <ul style="list-style-type: none"> <li>• Develop tools and communicate in the local language</li> <li>• Emphasize positive female role models</li> <li>• Work with men and women</li> <li>• Make use of local media</li> </ul>

SUCCESS FACTORS	
(ENVIRONMENT FACILITATING THE GOOD PRACTICE)	
<ul style="list-style-type: none"> <li>• New parity policy</li> <li>• Positive female role models</li> </ul>	
TOOL BOX I AM UNABLE TO READ THE WHOLE TABLE BECAUSE IT IS NOT VISIBLE?	
(TO FACILITATE WORK AND AVOID REINVENTING THE WHEEL)	
<ul style="list-style-type: none"> <li>• Flyers</li> <li>• Link to a radio interview</li> <li>• Public éducation posters</li> <li>• Training module</li> </ul>	
CHALLENGES	LESSONS LEARNED
(DIFFICULTIES AND CHALLENGES ENCOUNTERED)	(LESSONS LEARNED FROM THE CHALLENGES? CHANGES IN PRACTICES AND APPROACHES TO FACILITATE THE GOOD PRACTICE?)
<ul style="list-style-type: none"> <li>• Significant family pressures</li> <li>• Encouraging women to occupy more significant roles</li> </ul>	<ul style="list-style-type: none"> <li>• It's important to work with male leaders supportive of greater women's participation in politics</li> <li>• It's important to work with a family-centered perspective</li> </ul>
COSTS	
(CRUCIAL TO REPRODUCIBILITY OF THE GOOD PRACTICE)	
Training: XXXX FCFA (materials, honoraria, room rentals, meals)	
Tools: XXX FCFA (design, printing, shipping)	
Others:	
RISK MANAGEMENT	
RISKS IDENTIFIED AND MITIGATION MEASURES?	
Political resistance. Mitigation measures: work with men and women; promote inspiring female role models.	

### 5.2.3 EXAMPLE OF A PARTICIPATORY ACTION RESEARCH TOOL: POST-ACTION REVIEW AND REFLECTION

**Objective:** Carry out a process of reflection and analysis following completion of program activities.

**Methodology:**

- Determine who will participate in the process. Each participant must have a clear idea of the program's basic objectives, its duration and the stakeholders involved.
- Arrive at a consensus on the questions to be considered.
- Validate and complete, if necessary, the following grid with participants.

**Grid to be completed:** Example of analysis of gender mainstreaming in a completed program. Learning objective: to identify the best practices and the points to be improved in a future program.

Crosscutting integration of GE in program XYZ						
(Program component)	Activities/ actions	Good practices	Difficulties and solutions	Expected results	Real results achieved	Unexpected effects (positive and negative)
	Identification of a GE strategy	Systematic processing of strategic GE aspects adapted to all planning, and monitoring and evaluation documents  Training of program staff on the GE approach	Difficulty: time constraints with staff members not working directly on GE issues	All program staff members and volunteers assume their responsibilities regarding gender mainstreaming	The majority of program staff members and volunteers feel comfortable with GE issues	During the drafting of a new program, staff members agreed on the importance of developing a good GE strategy
	Preparation of a GE action plan		Solutions:1) the program manager declared GE a priority, which led to allocation of more time for GE activities; and 2) GE is considered in performance appraisals of GE staff members			
	Creation of a “GE specialist” position		Difficulty: resistance to certain GE concepts			
	Training of staff members and volunteers on GE issues		Solutions: 1) a series of trainings on everything from the most basic concepts, initially, to the most complex ones; and 2) training modules are given to new staff and volunteers upon recruitment			
	Adjustments to planning tools and monitoring and evaluation tools		Difficulty: crosscutting integration of GE in different program sectors	Mainstream gender systematically, and in a crosscutting fashion, in all spheres of the program	Sector X has very successfully integrated GE issues	
			Solution: identification of program's overall GE outcomes, as well as GE outcomes specific to different sectors		Sector Y has integrated GE to a slight extent	
RECOMMENDATIONS AND OPPORTUNITIES FOR IMPROVEMENT			It's important to sensitize and train all program staff members and volunteers (whatever their role) to foster progress in achieving GE target outcomes. GE integration must become systematic in programming. Rather than representing a supplementary task, GE must be seen as adding value. Although the majority of staff members and volunteers are comfortable with GE issues, there remains a certain number who need more support, or at the very least appropriate support.			
			What have we learned?			
			<ul style="list-style-type: none"><li>- GE lessons learned</li><li>- Lessons learned on process related aspects</li></ul>			



### TIPS FOR COMPLETING THE GRID

#### Good practices:

Did certain practices facilitate the realization of GE activities? If so, which ones?

#### Difficulties and solutions:

- What did not work and why?
- Did certain GE activities fail?

#### Expected results:

What was supposed to happen?

- What were the intermediate and ultimate GE target outcomes?
- Who were the key actors in the process?
- Who was supposed to play a key role in the process?

#### Real results achieved:

What did happen?

- How was GE improved in the target community?
- What was successful and why?

### CHECKLIST FOR THE PROGRAM PLANNING PHASE



- GE is an integral part of the learning process, whether in a specific or a crosscutting fashion.
- Women and men are represented equitably in both data collection and data validation.
- Data collection and analysis are gender disaggregated
- The principal success factors and obstacles that can affect the promotion of GE have been identified.
- Lessons learned: identification of what worked, what worked less well and why, for both GE specific and crosscutting interventions.
- The good practices to be replicated have been identified, whether these are GE specific or applicable in a crosscutting fashion.

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Additional resources:

Summary Reports published by the “Gender in Practice” Community of Practice (COP):

- *L’accompagnement des partenaires*
- *Théorie du changement*
- *Autonomisation économique des femmes*
- *Les communautés de pratique*
- *Politiques genre*
- *Les audits de genre*
- *Institutionnalisation du genre*
- *La masculinité*

Web site: <http://www.aqoci.qc.ca/spip.php?rubrique226>