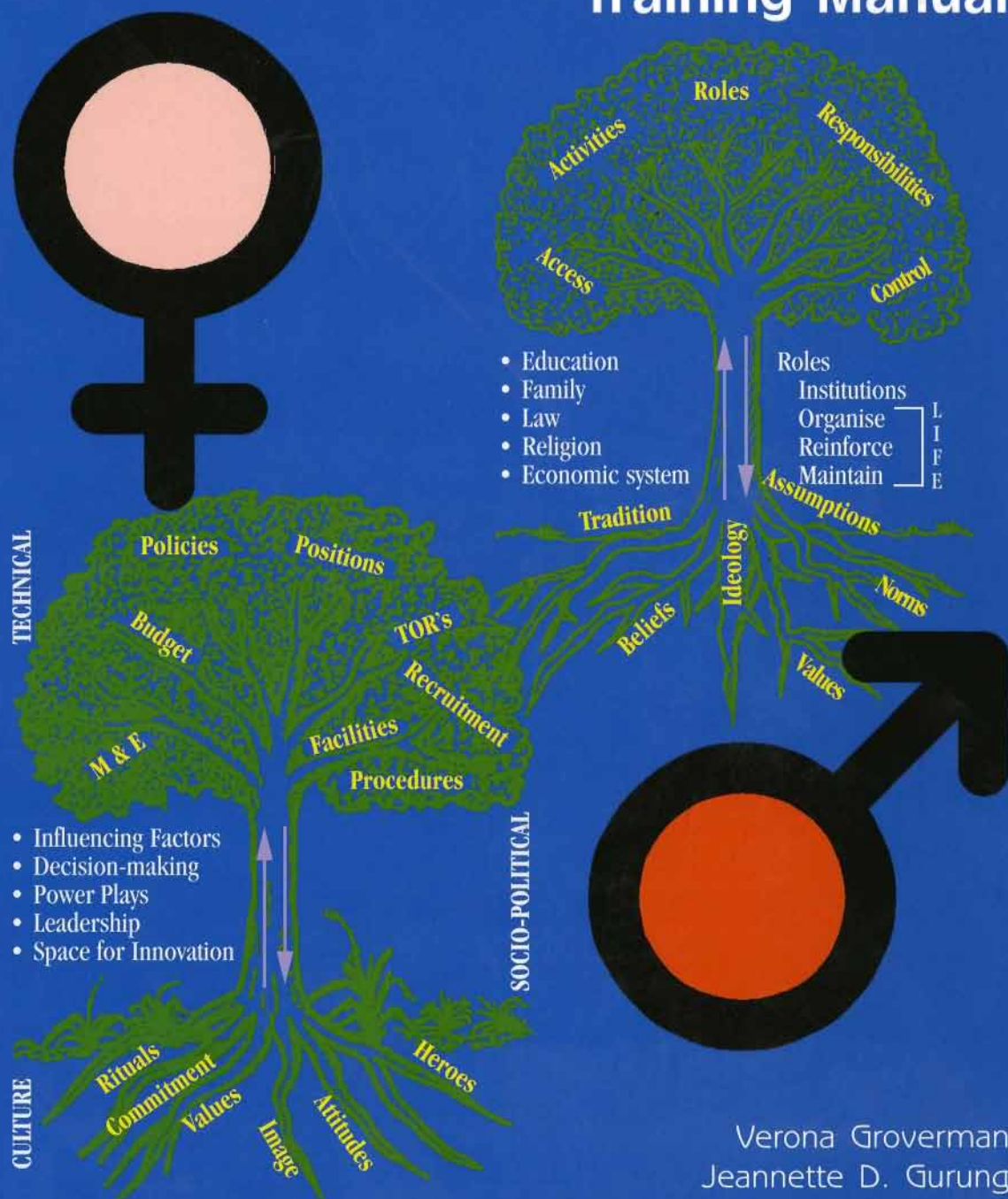


Gender and Organisational Change Training Manual



Verona Groverman
Jeannette D. Gurung

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Jeannette D. Gurung

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Greta Mary Rana (Senior Editor)
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PREFACE

Readers will appreciate the difficulties of translating a thoroughly participatory process like that involved in training people in and making them aware of gender in development organisations and in their work: how to be aware of its implications for the self? how to be aware of its implications for others? and above all, how to integrate it into an organisation and into the field in as non-threatening a manner as possible? Much of this, translated orally and in awareness-raising exercises, merges together into a holistic process that can, and often does, result in fundamental changes in the way people see themselves and their work. Putting it down on paper is another situation entirely.

Through their own insights and by judicious use of material already published, Verona Groverman and Jeannette Gurung have put together this useful manual on gender training. It is to their credit that both original and adapted material merge well into a logical and useful volume.

The volume is based not only on experiences from the Gender and Organisational Development programme of the International Centre for Integrated Mountain Development (ICIMOD) but on experiences from partner organisations and colleagues in the field as well as material already published.

Acknowledgements

The authors have carefully selected materials from many publications to enhance the quality and diversity of training materials. We are grateful to the following publishers for allowing us to freely reproduce their materials within these pages, so that all may benefit from their use.

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Harper Collins Publishers for pages 63-66 in *Talking From 9 to 5* by Deborah Tannen.

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International Institute for Environment and Development for pages 167, 171-2, 176, 192 of *A Trainer's Guide for Participatory Learning and Action* by J.N. Pretty, I. Guijt, J. Thompson and I. Scoones.

KIT Press for pages 91, 114 of *Gender and Organizational Change: Bridging the Gap Between Policy and Practice* by M. MacDonald, E. Sprenger and I. Dubel.

Oxfam UK and Ireland for pages 89, 226 of *The Oxfam Gender Training Manual* by S. Williams, J. Seed, and A. Mwau, and for pages 17-27 of 'Managing Organisational Space and Time' by Anne Marie Goetz in *Gender and Development*.

Prentice-Hall, Inc. for pages 346-34 of *Organizational Behavior: An Experiential Approach* by D.A. Kolb, J.S. Osland, and M. Rubin.

UNDP/PROWESS for page 62 of *Tools for Community Participation: A Manual for Training Trainers in Participatory Techniques* by L. Srinivasan.

UNIFEM for pages 30 and 47-49 of *Another Point of View: A Manual on Gender Analysis Training for Grassroots Workers* by Rani Parker.

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OBJECTIVE

INTRO. TO GENDER
CONCEPT & TECHNOLOGY

EX. PAPER AND COMMON

UNDERSTANDING

ANALYSIS TO

HOLISTIC, REALISTIC

TRAINING & PROGRAMMING FOR

DEVELOPMENT

LINKING BETWEEN

PROFESSIONAL LIVES

Background

BACKGROUND

The origins of this Training Manual on Gender and Organisational Change are in the 1990s rooted in the major outcomes of research undertaken in the Hindu Kush-Himalayan (HKH) Region. Shortly after the introduction of the Gender and Development Programme at ICIMOD in 1995, a Fact Finding Mission on the status of mountain women was carried out in mountain areas of the eight countries (Afghanistan, Bangladesh, Bhutan, China, India, Nepal, Myanmar, and Pakistan) of the HKH Region. This research was undertaken to bring a focus to and provide accurate data on mountain women's lives, as such information is unavailable in national-level databases. It was also the intention of the researchers to examine policies specifically aimed at women's development and the field-level realities that determine the effectiveness of these policies. By and large, significant gaps were noted by all the researchers between the stated policy and programme goals and the realities at mountain community level. In government plans, researchers found many women-focused programmes to address the practical and strategic needs of rural women, but found less evidence at ground level of any impact or, in many cases, that they were even known to local women. In many cases, policies designed in capital cities with the best intentions had not taken local realities of mountain women's lives into account.

In addition, most institutions involved in agriculture and natural resource management (including NGOs) in the region had not formally incorporated gender concerns into their research, extension, and training programmes. Indeed many of their staff were not aware of the meaning of 'gender' and demonstrated a gender blindness, leading to the widespread exclusion of rural women from participation in research and extension activities and limiting the degree of sustainability that these outreach actions could achieve. The common problems that women from this region experience - those of heavy workloads, poor education, little access to financial and health services and new technologies, and limited control over resources - have mostly not been addressed by those institutions responsible for rural poverty alleviation through improved land use. ICIMOD believed that a strategy to bring about gender-sensitised planning and implementation in these key agencies could do much to encourage more equitable development between men and women within these traditionally male-dominated organisations.

ICIMOD sought to address the problem of institutional neglect of gender concerns by developing a participatory training course (based on a course on 'Gender for Policy Development in Sustainable Land Use' offered by the International Agricultural Centre [IAC], Wageningen, and ETC Consultants for Development, Leusden, in The Netherlands) for staff from institutions working in agriculture and natural resource management in the region. The course was designed to build their capacities for gender-balanced development within their own organisations as well as in relation to their beneficiary groups. Women and men in key positions to guide policies and strategies in their institution were selected to participate in the training. They were selected from universities, research centres, government agencies, and NGOs that had demonstrated commitment to incorporating gender concerns into their programmes. These participants were expected to introduce changes to their organisations' policies and strategies and act as catalysts for gender-balanced development according to the Action Plans they developed during the course.

With a grant from the Dutch government, ICIMOD developed and offered an annual, regional course on **Gender and Organisational Development for Sustainable Land Use in the Hindu Kush-Himalayas** from 1997-2000. This course evolved through contributions from three key external trainers - Verona Groverman of ETC, The Netherlands, Ferida Sher of the Simorgh Women's Resource and Publication Centre,

Pakistan, and Nan van Leeuwen of IAC, The Netherlands; two gender staff from ICIMOD, Jeannette Gurung and Phuntshok Tshering; one other ICIMOD staff member, Kamal Rijal, and others who participated in the training over the three-year period.

The course and its participatory methods were greatly appreciated by all participants, which included men and women from 18 organisations in seven countries, including ICIMOD itself. All prepared an Action Plan as part of the course and received follow-up funds and support visits to assist in the implementation of the Plan.

To establish a training capacity at ICIMOD and within selected partner institutions in the region in order to spread the impact of the training, some participants were chosen for further training to develop their skills as gender trainers and facilitators of change. Twelve participants were selected to attend a Training of Trainers course in 1999. These men and women participated in a two-week course on training and facilitation methods; many have gone on to run similar courses in their own organisations and countries.

To assure the easy accessibility of training materials and participatory exercises, it was decided to produce a manual on gender and organisational change. Although the course is not currently offered by ICIMOD, we hope that its approach and tools can be made available to all who can make use of it, particularly those who have attended the course and would like to refresh their memories and apply that knowledge to other contexts.

WHAT IS THIS TRAINING MANUAL ABOUT?

This training manual is about gender and organisational change. It is based on experiences with training staff members of organisations engaged in development, research, and implementation related to natural resource management to introduce planned changes in their organisations related to gender. Our focus is on the challenge of how to change an organisation into one in which both men and women feel at ease in their working environment and find equal opportunities; an organisation in which actions are purposely taken to reach and maintain this situation. We call this ideal a 'gender-friendly' organisation. Such 'gender-friendliness' will also be reflected in the mission of the organisation, its aims, activities, approaches, and so on. We believe that gender friendliness will contribute to better products from the organisation in terms of gender equality. For instance, in rural development programmes, both male and female users of natural resources will benefit from the efforts undertaken. This kind of organisational change does not occur automatically. It requires the input of capable facilitators/change agents concerned with gender issues in organisations.

The manual aims to assist facilitators and trainers with processes of organisational change for gender equality within development organisations. It consists of short explanations of key concepts followed by exercises and handouts to increase understanding and skills, and also to build up enthusiasm for supporting the change process. On the one hand it is set up to help facilitators/change agents and trainers working in particular organisations to discuss gender and organisational change with staff members. On the other hand, the manual can be used by outsiders to increase their understanding of and skills as facilitators/and trainers themselves. The manual does not include theories and exercises to become trainers. People facilitating change processes do not necessarily have to be trainers, although their approach may contain some training, for instance to raise awareness about gender.

SET-UP OF THE MANUAL

The manual consists of three parts. The first part is an introduction to gender concepts in order to understand gender-related organisational change. Because of ICIMOD's focus, the context is one of natural resource management. This part is limited and far from innovative, because we do not want to add another volume to the many existing gender and natural resource management documents. We have rather built upon existing materials as indicated in the references.

The second part addresses the process of organisational change related to gender. In part, three skills required by facilitators of processes of organisational change and gender are covered. The exercises focus on insights and skills in social processes to enable facilitators to introduce and guide organisational change. The exercises in both parts were developed during the various training courses, drawing on relevant sources from the literature on organisational change and gender.

HOW TO USE THE MANUAL

The manual can be used as a guide for training. Step-by-step concepts and tools are discussed, followed by exercises to practice what has been discussed. However, the manual is a guide and not a recipe book. Each training section is different: the reason why it is organised, the context in which it takes place, the background of the participants, and so on vary. Thus, exercises may require adjustment to suit a particular need. The steps in this manual are based on our experiences and, in our view, have a logical sequence: starting with the concepts and tools related to gender we move on to organisational change and gender and, next, to individual skills required to facilitate this process.

The three steps form the three parts of the manual, which are further divided in various sections. Each section begins with a conceptual part. This is of an explanatory nature and includes various concepts and a framework that link the various components of the manual, wherever relevant links to other sections are indicated. Key information is presented in boxes and tables, and these can be used as handouts during training. At the end references are added for further reading. The conceptual part of each section is followed by exercises to increase the knowledge, insight, and skills of participants about the concepts and tools. Moreover, the exercises aim to increase the enthusiasm and motivation to become involved in organisational change in relation to gender. In some exercises handouts that can be found at the end of each section are used. The exercises often refer to personal experiences because we feel that reflection on one's own views and situation is one of the best ways to gain insight, change attitudes, and motivate action.

Part 1
Gender

INTRODUCTION

In this part of the manual we focus on the concept of gender: What is gender? How can we find out about gender in different settings? Why is it important to consider gender in development and research programmes? Many manuals and articles deal with gender and related concepts and tools for gender analysis. Some definitions are simple, others are complex; there is overlap, but also contradiction. Some tools are easy to use, others need considerable inputs in terms of time, resources, and skills. Here we do not discuss the various concepts and analytical tools in depth, but limit ourselves to brief definitions and explanations in order to understand the social processes that are addressed in this manual: changes within organisations and, related to these, the programmes or other products of such organisations. We particularly make use of one set of concepts developed by A. Rani Parker, I. Lozano and L.A. Messner for Save the Children.

This part is divided into three sections. In Sections 1 and 2 we pay attention to gender and related concepts and frameworks for gender analysis. Since our experiences are to a great extent linked to organisations engaged in natural resource management, we specifically addressed the linkages between gender and natural resources in an exercise. The last Section (3) is concerned with gender and rural development programmes as the products of the organisations on which we are focusing.

Section 1: What is Gender?

The concept of gender is, for many people, a new idea. Basically it is simple: it is about men and women, about what they do and feel and how they relate to each other in their own societies. In all societies and families, men and women learn, through socialisation processes, how to behave properly within a community or organisation. However, behaviour is not fixed, as it is influenced by social, cultural, economic, political, and ecological factors. There is no natural distinction of what men and women should do beyond distinctions related to their physical differences. This is seen clearly by the variance in the types of activity women and men are engaged in in different countries or even areas within countries. In some places women work in construction, in others that is 'not done'; in some parts men wash dishes, in others men will never do this; in some organisations men and women discuss decisions together at meetings, in others women do not speak out in the presence of men. This behaviour does not apply to every woman or man in that particular situation: we see differences in the attitudes and behaviour of men and women of different age groups, social class, caste, and ethnicity.

Thus, the behaviour and attitudes of men and women vary in every society and between societies, and vary over time. This results in a rich diversity of men and women, resulting in an even richer diversity of experiences and capabilities of people. We feel that in every process of change, including organisational change, we should draw on this diversity and value it highly.

The 'gender wheel'

The 'wheel' pictured below is useful for understanding the concept of gender¹. The relationships between roles, rights, and so on are visualised by using a circle with inter-relating 'spokes'.

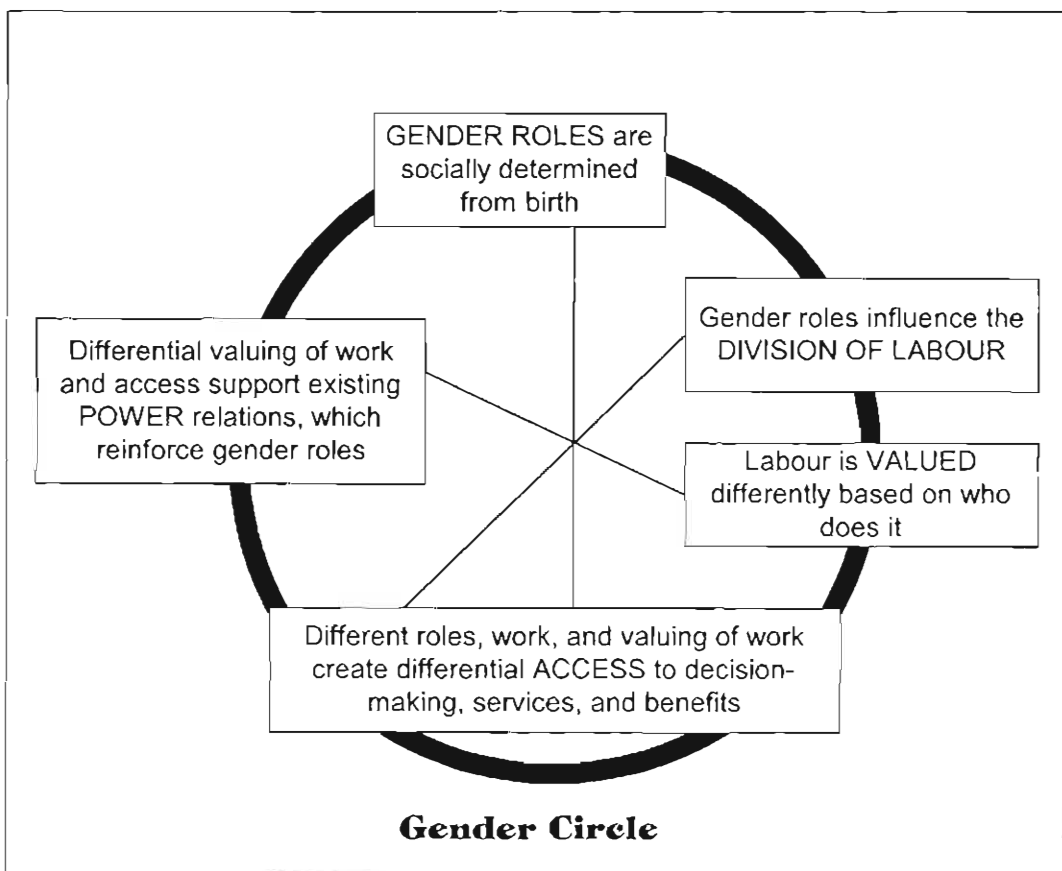
¹ Parker et al. (1995) developed the gender circle and we have changed it slightly.

Our dictionary

Gender is about the Roles, Responsibilities, Rights, Relationships and Identities of men and women that are defined or ascribed to them within a given society and context. Gender is about how these roles, responsibilities, rights, and identities of men and women affect and influence each other. Gender points to their dynamic nature: they are changeable over time, between places and within places. In that sense gender differs from the concept Sex.

Sex refers to the biological nature of being male or female. The biological characteristics of men and women are universal, obvious, and, in general, permanent. Sex roles are those which are bound to one particular sex due to biological factors, for instance, breastfeeding.

Gender roles refer to how men and women should act, think, and feel according to norms and traditions in society. Roles are reflected in the tasks and responsibilities expected of men and women and identities associated with being male or female in a certain society. In many organisations, socially accepted roles are reflected in the positions and responsibilities of male and female staff. Gender roles influence the **division of labour**, i.e., the tasks and responsibilities allocated to men and women according to what is felt to be acceptable in society. Gender roles are 'learned' through socialisation processes. We can distinguish between tasks and responsibilities related to:



- production (activities such as crop production, processing, marketing, wage employment, and so on);
- reproduction ('unpaid' activities such as care of the family, child bearing, food and water collection, home maintenance, and so on);
- social/community management (social activities at neighbourhood, community, organisation level, political participation, and so on).

These **triple roles** are not only visible at household and community levels but also within organisations.

Values are attached to these different tasks and responsibilities that are different for men and women. This is termed the **gender valuation of work**. Differences in roles, tasks, and responsibilities and valuation have a great impact on two essential elements for survival and development: the access to and control over resources (natural resources, information, services, facilities, time, funds, and so on). They create differential access between men and women to these resources, to decision-making, and to benefits related to them. This is termed gendered access, emphasising that access is socially constructed.

The determination of what behaviour is valued and who obtains access and control of resources is determined largely through **power relations**. The current gender valuation of work and levels of access and control support the existing power relations and, in turn, power relations affect access and valuation. Access is about the distribution of resources in which power relations are at stake. Power relations have a strong gender dimension as they have to do with the capabilities and opportunities of men and women to influence processes. We can also see the links between gender roles and tasks and responsibilities, affecting who can play a role in influencing processes. See Part 3 for more on this topic.

Our dictionary

Gender roles refer to how men and women should act, think, and feel according to norms and traditions in society and are reflected in their tasks and responsibilities and identities associated with them.

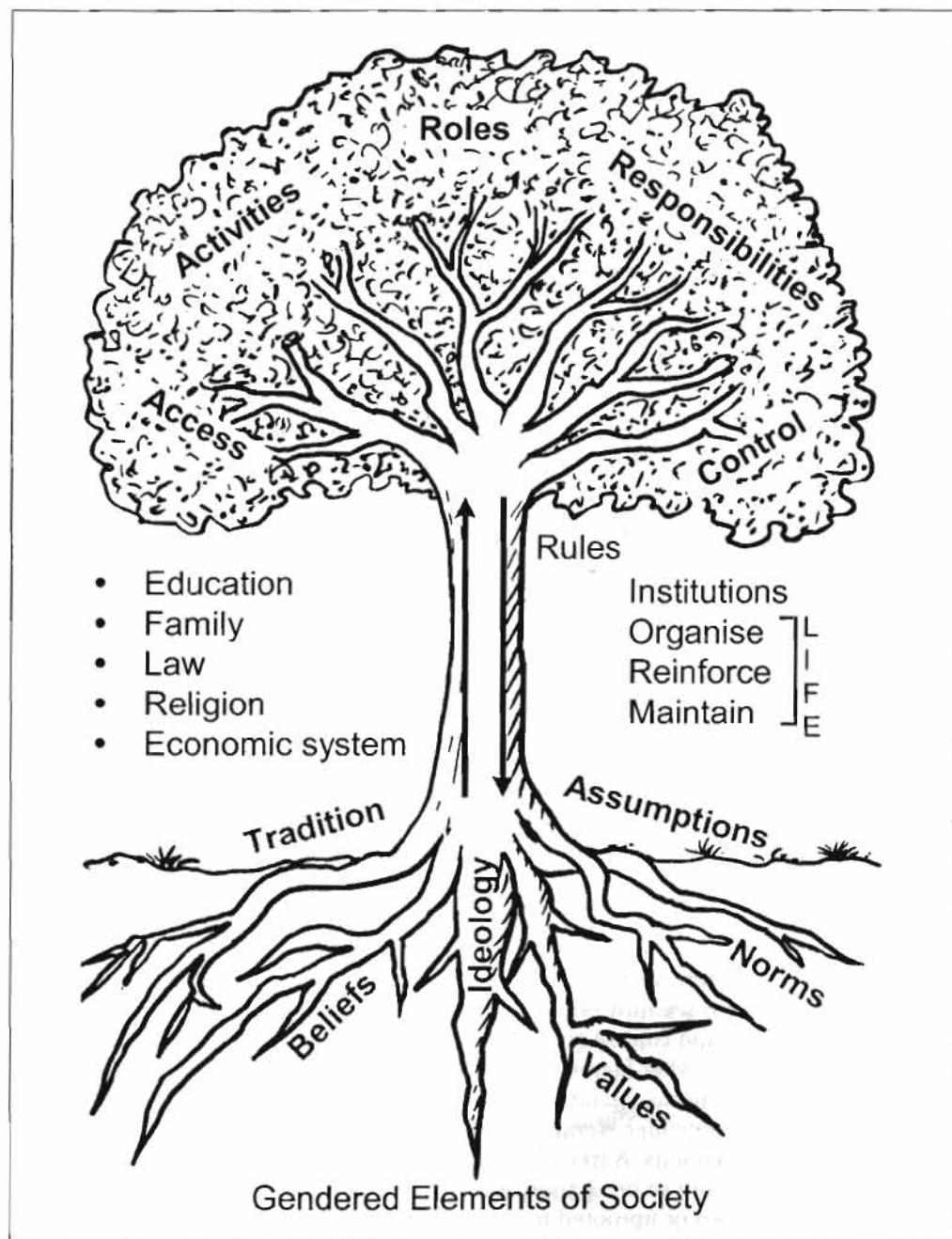
The **gender division of labour** concerns allocation of the tasks and responsibilities of men and women according to felt, accepted patterns of work.

The **gender valuation of work** refers to the values attached to different tasks and responsibilities of men and women.

Gendered access and control refers to the fact that access and control over resources and so on are socially constructed.

Gender is to a certain extent visible: we can see what men and women are doing, but it becomes more difficult to see how people value their actions. It is not an easy task to observe who has access and control over certain resources and processes. Even more complicated is to find out what factors are underlying these observations and processes – these are the traditions, norms, assumptions, and values of individuals and societies. In order to understand how gender is constructed, we can use the symbol of a tree with both its visible and hidden elements. A tree also symbolises other characteristics of gender. Roles, gendered access, and so on change over time as a tree changes its form and size. It can purposely be trimmed or uprooted to change its appearance or well-being without

killing the tree. The management of such a process needs a critical consideration of the right time, context, instruments, and people to carry out the job – just as does transforming gender roles and relations in order to create a better balance between men and women.



FURTHER READING

- BRIDGE (1999) *Resource Guide to Southern Gender Training Materials*. Brighton: IDS, University of Sussex
- Food and Agriculture Organisation of the United Nations (1997) *Socio-economic and Gender Analysis Programme (SEAGA)*. Rome: FAO
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- Parker, R.; Lozano, I.A.; Messner, L.A. (1995) *Gender Relations Analysis: A Guide for Trainers*. New York: Women Ink
- Royal Tropical Institute (1998) *Gender Training: The Source Book*. Amsterdam: KIT Press
- Williams, S.; Seed, J.; Mwau, A. (1994) *The Oxfam Gender Training Manual*. Oxford: Oxfam UK and Ireland

EXERCISES: THE CONCEPT OF GENDER

We present a few simple exercises to increase understanding of the concept of gender. See 'Further reading' for more suggestions. Videos, films, and case studies are powerful stimuli for discussion, especially when they are based on the local context. Users are invited to look for locally available materials and to develop case studies themselves.

A. Likes and dislikes

(adapted from Williams et al. [1994, activity 26])

Aim of the exercise: to better realise that behaviour and feelings of men and women are influenced by society.

Time: about 30 – 45 minutes

Method: individual reflection, discussion

Materials: marker and cards for each participant, whiteboard or wall

Steps

1. Ask each participant to write answers to the following question on cards. 'What would you like and what would you dislike if you were the other sex?' Let them write one answer per card, indicating their sex. Use different colours for the 'likes' and the 'dislikes'.
2. After 8 minutes collect the cards. Put the cards on a wall differentiating between male and female participants. Discuss in plenary the different answers and the possible reasons behind the answers.

Variation

Instead, the following question can be asked to male participants.

'What do you enjoy most or like best about being a man? What do you dislike most or like least about being a man?' Ask the same question to each female participant about being a woman. Compare the outcomes.

B. Statements about Sex and Gender—an exercise stimulating discussion

(Williams et al. 1994 pp 89)

Aim of the exercise: to understand the difference between sex and gender

Time: about 30 minutes

Method: statement game

Materials: pen and paper, handout to exercise B Part 1 (list of statements)

Steps

1. Discuss the concepts of gender and sex
2. Read the statements aloud and ask each participant to write the answer to each statement: either Gender or Sex
3. Distribute the handout and discuss the answers.

C. Statements at the work place

Lowitz (1980)

Aim of the exercise: to better understand the concept of gender as a social construct

Time: about 30 minutes

Method: statement game

Materials: pen, paper-handout to exercise C - Part 1 (list of statements) see 'He Works, She Works'

Steps

1. Form small discussion groups, mixed or men and women-only.
2. Give each group copies of the handout with statements and ask them to discuss
 - a) whether or not they recognise the statements, and
 - b) what the consequences arising from certain 'statements' have been and which they have faced themselves or what could have been consequences. Ask them to make notes.
3. Discuss the most striking observations of the groups in a plenary session.

D. Changing gender roles

Idea: Ferida Sher

Aim of the exercise: to better understand how men and women are socialised to roles and identities

Time: about 30 minutes

Method: role play

Materials: depending on ideas of participants

Steps

1. Ask a few participants to prepare and play roles related to an activity that is usually performed by the other sex. You can propose, for instance, that men 'feed a nine-month old baby'; 'bathe a 1 ½ year old child'; and that women 'fix a fuse when the electricity goes out'.
2. Discuss afterwards. Pay specific attention to how the players felt about their roles and the way they performed.

E. Heroes and Heroines

Idea: Nan van Leeuwen

Aim of the exercise: to better understand that behaviour and actions are ascribed by cultural and social factors.

Time: about 40 minutes

Method: individual and group reflection

Materials: pen and paper, whiteboard

Steps

1. Ask each participant to write down the name of her/his hero or heroine and what characteristics make him or her a hero/heroine.
2. Discuss the outcomes. Pay attention to similarities and differences in qualities and in the wording used by participants to describe characteristics of heroes and heroines.

HANDOUTS

Handout for exercise B: List of statements about sex and gender

(Williams et al. 1994, pp 89)

Statements about men and women

1. Women give birth to babies, men don't. (S)
2. Little girls are gentle, boys are tough. (G)
3. In one case, when a child brought up as a girl learned that he was actually a boy, his school marks improved dramatically. (G)
4. Amongst Indian agricultural workers, women are paid 40-60 per cent of the male wage. (G)
5. Women can breastfeed babies, men can bottlefeed babies. (S)
6. Most building-site workers in Britain are men. (G)
7. In Ancient Egypt men stayed at home and did the weaving. Women handled family business. Women inherited property and men did not. (G)
8. Men's voices break at puberty, women's do not. (S)
9. In one study of 224 cultures, there were 5 in which men did all the cooking, and 36 in which women did all the house building. (G)
10. According to UN statistics, women do 67 per cent of the world's work, yet their earnings for it amount to only 10 per cent of the world's income (G).

Handout for exercise C: List of statements 'He works, she works'

(Lowitz 1980)

Source: Unknown

HE WORKS, SHE WORKS

BUT WHAT DIFFERENT

IMPRESSIONS THEY MAKE!

Have you ever found yourself up against the old double standard at work? Then you know how annoying it can be and how alone you can feel. Supervisors and co-workers still judge us by old stereotypes that say women are emotional, disorganised, and inefficient. Here are some of the most glaring examples of the typical office double standard.

The family picture on HIS desk Ah, a solid responsible family man	The family picture is on HER desk Hmm, her family will come before her career.
HIS desk is cluttered He's obviously a hard worker and a busy man.	HER desk is cluttered She's obviously a disorganised scatter-brain.
HE'S talking with co-workers He must be discussing the latest deal.	SHE'S talking with co-workers She must be gossiping.
HE'S not at his desk He must be at a meeting.	SHE'S not at her desk She must be in the ladies room.
HE'S not in the office He's meeting customers.	SHE'S not in the office She must be in the ladies room.
HE'S having lunch with the boss He's on his way up.	SHE'S having lunch with the boss They must be having an affair.
The boss criticised HIM He'll improve his way up.	The boss criticised HER She'll be very upset.
HE got an unfair deal Did he get angry?	SHE got an unfair deal Did she cry?
HE'S getting married He'll get more settled.	SHE'S getting married She'll get pregnant and leave.
HE'S having a baby He'll need a raise.	SHE'S having a baby She'll cost the company money in maternity benefits.
HE'S going on a business trip It's good for his career.	SHE'S going on a business trip What does her husband say?
HE'S leaving for a better job He recognises a good opportunity.	SHE'S leaving for a better job Women are undependable.

Section 2: How to Find Out about Gender? – Gender Analysis

A gender analysis can be carried out to understand the roles and relationships of men and women within a given context. It can be done in a community, region, and so on, as well as in an organisation (see Part 2 - Section 2 for more on organisational analysis).

Our dictionary

Gender analysis is the systematic effort to understand the roles and relationships of men and women within a given context such as that of a household, community, region, or organisation.

Gender analyses are often done in the context of development efforts. Throughout the years various tools for analysis have been developed. These tools address a number of key issues which are ordered or framed in a particular way according to a specific framework (see Box 1).

Box 1: Key areas for analysing gender roles and relations

Note: It is important to identify the age group, class/caste, ethnicity, and marital status of the men and women participating in the analysis.

- Activities (tasks and responsibilities): who does what, where, and when?
- Amount of time spent conducting their tasks and responsibilities, considering seasonality: how much time is spent and when?
- Access to resources required for the tasks and responsibilities and to the benefits derived from using them, according to gender
- Control over these resources and over the benefits derived from their use, according to gender
- Role and participation of men and women in decision-making processes at household and community levels, within formal and informal groups
- Needs and priorities of men and women in the context of improving the present situation, for both the short and long term
- Effects and impacts of certain trends and developments on men and women, including economic, demographic, environmental, sociocultural, political, and legal developments
- Constraints and barriers to active involvement of men and women in development efforts and initiatives to overcome these
- Opportunities and options open to men and women to improve their lives
- Organisations involved in local development and their capabilities in terms of recognising and addressing gender issues

Usually these questions are framed for purposes of analysis in 'profiles', in which we can see links between the different elements of the 'gender wheel' (see Part 1 - Section 1) such as the following.

- Activity profile – concerning tasks and responsibilities carried out by members of a household according to gender, age, and marital status and related to time and location. It includes the question, “Why are these arrangements as they are (cultural, social, economic, legal, etc. factors)?”
- Resource profile – concerning access to resources in order to pursue activities and to receive benefits and the control over resources and benefits. It includes the question, “Why are these arrangements as they are?”
- Participation profile – concerning participation in decision-making processes in general and in relation to development efforts. It includes the question, “Why do certain people participate and what are the barriers and opportunities for participation?”

Here, we do not elaborate on the different gender analysis tools and methods to gather information. There are many tools and frameworks for gender analysis, and these are described in the following books.

FURTHER READING

On gender analysis frameworks and methodologies

March, C. (ed) (1996) *A Tool Kit: Concepts and Frameworks for Gender Analysis and Planning*. Oxford, UK: Oxfam Gender and Learning Team

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'Gender and Natural Resource Management: An Introduction' (Handout # 76). In Williams, S.; Seed, J.; Mwau, A. (1994) *The Oxfam Gender Training Manual*. Oxford: Oxfam U.K. and Ireland

Commonwealth Secretariat (1996). *The Pan-Commonwealth Training Module on Women and Natural Resource Management* (Africa, Asia, South Pacific, Caribbean). London: Commonwealth Secretariat

On participatory exercises

Pretty, J.N.; Guijt, I.; Thompson, J.; Scoones, I. (1995) *A Trainers Guide for Participatory Learning and Action*. London, U.K.: International Institute for Environment and Development

EXERCISES: GENDER ANALYSIS

F. Gender analysis as a tool

(FAO 1995)

Aim of the exercise

1. To get to know one of the frameworks for gender analysis
2. To increase knowledge about the strengths and limitations of gender analysis tools

Time: about 25 minutes

Method: video, discussion

Materials: video 'Gender Analysis for Forestry Development Planning: Why and How?' available from the Senior Community Forestry Officer, Forestry Policy and Planning Division, Forestry Dept., Food and Agriculture Organisation of the UN, Vialle delle Terme di Caracalla, Rome 00100 Italy. pen and paper, whiteboard

Steps

1. Explain that a video will be shown which illustrates one of the gender analysis frameworks. Explain the framework briefly.
2. Show the video.
3. Discuss the video. Ask for the observations and comments of participants. Point to the advantages and pitfalls of the framework and development approach promoted in the video.

Variation

1. More specific questions can be asked to direct the attention of the participants while watching the video to adjust it to their background and needs. Moreover, specific questions can be made related to the handout.
2. Use the ICIMOD video on gender relations in Nagaland, India (described below) and have different groups answer the questions listed in the box below.

Questions on the ICIMOD Film *Land and Ritual: Among the Angami Naga*, 1997 (23 min) (available from Publications, ICIMOD, Box 3226, Kathmandu, Nepal)

1. Who are the stakeholders? What are their different perspectives? Do they conflict?
2. What are the key issues to monitor? What are the key aspects of sustainability here? How do you know if it is equitable?
3. What are the changes? What are the causes of the changes? Which are positive and negative elements of change and why?
4. What are the impacts on gender relations? What strategies do men and women use to deal with these changes?

G. Links between gender and natural resources

Aim of the exercise: to increase understanding of the links between gender and natural resources

Time: about 45 minutes

Method: reflection on own situation, discussion

Materials: Handout of exercise G (Gender and Natural Resource Management) — pen and paper, whiteboard

Steps

1. Give the handout to each participant. Explain the diagram and exercise. Ask each participant to select one natural resource she/he is familiar with through their own experiences in a development programme. Let them answer the following questions.
 - a. What roles and responsibilities related to managing the natural resource you have chosen do men and women have at your own project site?
 - b. Do women have equal access and control relative to men to that resource at your project site? Explain the situation. If no, go to questions c and d; if yes, go directly to question d.
 - c. Identify four main factors responsible for creating inequalities.
 - d. Do you feel that women, relative to men, receive a 'fair' share of the benefits arising from the management of that particular resource? Explain.
2. Form small groups around each type of natural resource to exchange information and ask the group members to describe three striking observations.
3. Discuss the observations in a plenary session. The important issues to consider are the elements of the gender wheel: division of labour, valuation, gendered access and control; variety between and within places (projects); and the personal perspective of the participant in judging the situation in terms of 'equal' and 'fair'.

HANDOUTS

Handout for exercise G: Gender and natural resource management

Kamal Rijal

Agro-ecosystems consist of a number of natural resources that are interrelated in a complex way. Men and women make use of these resources according to certain rules and norms prevailing in a specific local culture. Often the roles of women and men in natural resource management are complementary and intertwined. The following diagram, based on FAO (1997), is a simplified way to describe the roles, responsibilities, and rights of male and female users of four inter-linked types of natural resource. The linkages between the resources and the ways men and women make use of them at household and community levels are dynamic in nature. They can be affected by a number of external factors, such as commercialisation, political interests, agricultural policies, but also by drought, diseases, and so on.

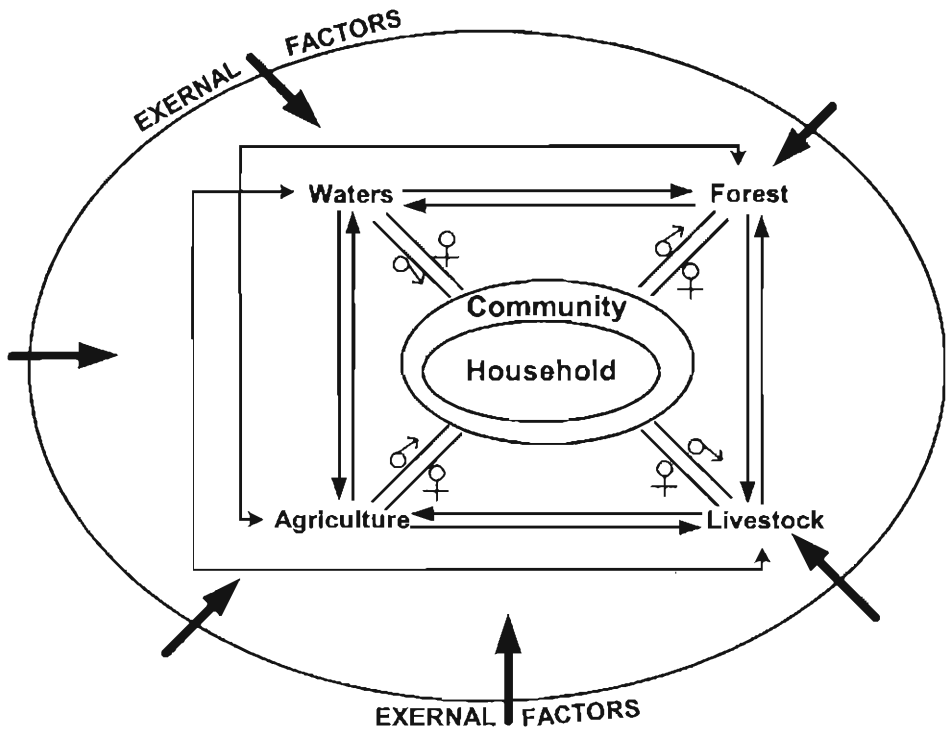


Diagram Belonging to Exercise G

Section 3: Gender and Development

Gender cannot be overlooked in any development programme, because differential roles, responsibilities, rights, and identities form part of social reality. Furthermore, men's activities or rights mutually affect those of women and, thus, changes to one will affect the other. In other words, development efforts will always, purposely or not, impact men and women differently.

Since the 1970s, the lower status and living conditions of women around the world have generated global concern. Women's concerns or issues and, later on, **gender concerns/ issues** were identified to show how unequal responsibilities, rights, and values were felt to be unacceptable, i.e., being a concern to people. These views are based on perceptions that people have of a present situation as compared to an ideal situation. The differences between the present unacceptable situation of women relative to men and the ideal situation are called **gender gaps**. It is important to stress that perceptions can vary: what one person considers unfair or unjust inequities can be acceptable to another.

Over the years different approaches towards women have been applied in rural development programmes to overcome 'gaps' as perceived by planners, policy-makers, and implementers. The focus gradually changed from women – the Women in Development (WID) approach - to one of relations between women and men. Called the Gender and Development (GAD) approach, this aims for equitable, sustainable, and participatory development. Equitable development means that gender relations become more balanced. It can be compared to the process of adding weight to one of the pans of a balance. In many cases women have less 'weight', for instance, they take less part in decision-making processes or have less control over land. Men have often less 'weight' in the area of daily care of children. To balance the scales one needs power, therefore, we often speak of empowerment of women (or men). Equitable development is closely related to participatory development, which means that women and men are able to voice their views and needs and to take part in decisions affecting their situation.

To better address the situation of women relative to men a distinction is made between condition and position in society. It helps to differentiate between categories of gender needs: the practical gender needs, which relate to the condition, and strategic gender needs, which relate to the position of men and women relative to each other.

Our dictionary

Condition refers to the immediate, material circumstances in which men and women carry out their responsibilities. It relates to basic needs such as those for food, shelter, water, and health.

Practical gender needs (PGN) arise from the gender roles, division of labour, and access to resources. They are material in nature and concern short-term and felt, immediate needs. In general they are relatively easy to identify as they relate to the condition of women and men, typified, for instance, by a shortage of nutritious food, health care, or drinking water. When addressed, men and women can perform their gender roles more efficiently and easily.

Women's position refers to women's place in society in relation to that of men. It relates to power, status, and control over decisions and resources.

Strategic gender needs (SGN) arise from unequal relations and control over resources. They refer to social relations between men and women. In general, SGN are less visible and more difficult to identify. Examples are unequal access to jobs, unequal wages, and fewer legal rights. They require more long term and radical actions, as changes are required in attitudes, behaviour, beliefs, values, power relations, laws, and so on.

Gender concerns or issues refer to differences in responsibilities, rights, values, and power between women and men, which are felt unacceptable and, therefore, need to be addressed.

Gender gaps are differences between the present unacceptable condition and/or position of women relative to men and what is considered an ideal situation

Since most development programmes strive to achieve sustainable development, attention to the condition and position of women and men is a basic requirement. Planners and implementers can be helped in their efforts through creation of an awareness of the underlying values and ideologies of development approaches as well as by increasing

knowledge and insight in the situation of men and women. Conducting a gender analysis (see Part 1 - Section 2) of a community is a way to gain knowledge and insight, as it can be considered a situation analysis for planning and monitoring and evaluation purposes. Gender analysis is part of gender planning, i.e., planning for development in which gender needs are identified and gender issues are addressed, thus contributing to equitable, sustainable, and participatory development. It includes specific attention to the opportunities and barriers of women and men to such development (see the key areas and profiles in Section 2). Based on this information approaches and strategies can be developed.

More information on concepts, approaches, methods, and experiences related to gender in development goes beyond the aim of this manual. We refer to the wealth of existing literature. In 'further reading' some practical handbooks are included.

FURTHER READING

On concepts, approaches and planning

- Abbot, J.; Guijt, I. (1998) *Changing Views on Change: Participatory Approaches to Monitoring the Environment*. SARL Discussion Paper No. 2. London: International Institute for Environment and Development
- Moffat, L.; Geadah, Y.; Stuart, R. (1991) *Two Halves Make a Whole: Balancing Gender Relations in Development*. Ottawa: Canadian Council for International Cooperation
- Guijt, I. (1998) *Participatory Monitoring and Impact Assessment of Sustainable Agriculture Initiatives*. SARL Discussion Paper No.1. London: International Institute for Environment and Development
- Moser, C. (1993) *Gender Planning and Development: Theory, Practice and Training*. London and New York: Routledge
- Schaap, M. (1998) *Reference Guide for Gender Responsiveness in Project-Cycle Management*. Kathmandu: FAO Nepal
- Williams, S.; Seed, J.; Mwau, A. (1994) *The Oxfam Gender Training Manual*. Oxford: Oxfam UK/ Ireland

EXERCISES: GENDER AND DEVELOPMENT

H. Development approaches towards women in relation to men

Aim of the exercise

1. To gain insight into the approach of development programmes
2. To increase awareness about personal perceptions and values concerning gender in development programmes

Time: about 40 minutes

Method: reflection on the own situation, discussion

Materials: Handout of exercise H (Overview of approaches) — Pen, paper, flipchart, whiteboard

Steps:

1. Introduce the topic and aims of the exercise. Stress that any overview is a simplification and abstraction of the reality, but instrumental to increasing our insights.
2. Ask each participant to reflect on the following questions.
 - a. In which approach(es) would you place the programme/project you work in? Explain.
 - b. Why do you feel that gender issues need to be addressed in the programmes of your own organisation? Write all your arguments on a piece of paper.
 - c. Exchange your views in a small group and together select a few arguments to present to the plenary. Write them on a flip chart.
3. Discuss the outcomes of the groups in the plenary. Point out possible differences between justifications of approaches in programmes of the organisations and the personal views of participants. Reflect on the consequences of such differences.

I. Different perceptions

(Pretty et al. 1995, pp 192)

Aim of the exercise: to better understand that people differ in their perceptions of the world around them

Time: about 15 minutes

Method: game

Materials: Handout A of exercise I (woman's picture) on overhead sheet — Handout B of exercise I, Overhead projector - Whiteboard

Steps:

1. Prepare diagrams of K and H in advance on a flip chart.
2. Show the woman's picture and ask participants what they see.
3. Discuss different perceptions of the same picture and possible reasons. Reflect on possible consequences for design and implementation of development programmes.

4. Show the diagram of 'K' and ask participants what they see. When you get the response show the diagram of 'H' and ask again what they see.
5. Discuss why the diagram of 'H' was easier to recognise. Ask about personal experiences related to differences in perceptions and influencing mechanism.

J. Nuts game

Idea: J.J. Edney, source unknown

Aim of the exercise: To increase understanding of sustainable and equitable development

Time: about 45- 60 minutes, depending on the number of small groups formed

Method: game

Materials: walnuts or any kind of nut or bean of that size will do, at least 25 nuts per group formed. A few bowls according to the number of groups — whiteboard

Steps

1. Write in advance the goal and rules on a flipchart. The player's goal is to get as many nuts as possible during the game. The rules are:
 - a. do not communicate verbally,
 - b. players take nuts in any quantity out of the bowl simultaneously using only one hand. This makes a 'round' which takes not more than 10 seconds. In every bowl there are 25 nuts.
 - c. The balance left in the bowl is doubled after each round by the facilitator, up to a maximum of 25 nuts.
 - d. The game is over when the bowl is empty or after 6 rounds.
2. Tell the participants of the strict adherence to the rules. Explain the goal and rules as written on the flipchart.
3. Play the game. After each round write the number of nuts left in each group on the whiteboard.
4. Discuss what happened after the first game. Ask how many nuts each player has in his/her hands. Usually most groups have emptied their bowl completely after the first round, thus they are unable to continue the game, with a large variety in individually gathered nuts.
5. Play another game, changing the rules: participants are allowed to discuss with each other during the game. Give them 5 minutes to prepare themselves.
6. Play the game again and write down the number of nuts left in each group and, at the end, the total number of nuts collected by each group member.
7. Discuss what happened: the scores but also the processes that took place in the group, attitudes of players, etc. To what extent are issues of equity taken into account? Are gender needs or possible differences in perspectives of men and women considered?

What does the game symbolise? The bowl represents the resource pool, the nuts are the resources. The replenishment cycles (doubling the number left) represent the natural resource regeneration rates; taking the nuts is harvesting behaviour - nuts can be taken according to needs, aspirations, values, etc. Point to the sustainability of resources and equity as well as factors influencing them.

K. Community level study

This exercise can be done in various settings: as field work in a community site, through case studies and through reflection on the participant's own work related to development programmes. Colleagues and/or the men and women of the target group can be involved as well. The more people involved in the study, the more clearly different perspectives become visible.

With respect to case studies, it is advisable to use cases that are familiar to the participants to enable them to better reflect on their own way of working and thinking. Case studies can be found in training manuals or developed by the trainer. Care should be taken with the use of existing case studies: in most cases they need to be adjusted to fit the training and the background of the participants. Programmes of the own organisation could be used as cases as well but with care: critical analysis might be sensitive and prevent the free flow of opinions. We have added two case studies - see Handout A and B of exercise K.

Field work provides a good context for further discussion and reflection, but it requires careful preparation. Depending on the skills and knowledge of the participants more or less attention should be paid to concepts, analysis, tools, methods of data collection and analysis; team work, approaches towards community members, report writing, data presentation, and so on. Role-playing and games can be useful instruments for preparing for the field work. A useful guide is *Participatory Learning and Action, A Trainer's Guide* by Pretty et al., 1995.

As discussed in Part 1 - Section 2, there are several tools for gender analysis. A tool should be selected that fits the training and participants. We found one tool, the Gender Analysis Matrix or GAM (Parker 1993), particularly useful because it focuses on changes within a community related to labour, time, resources, and culture. This framework fits in quite well with the gender wheel which forms the conceptual background of this manual (see handout C of exercise K).

Aim of the exercise: 1. To increase understanding of the condition and position of men and women at community level. 2. To get more insight into different perceptions of men and women regarding their situation and future. 3. To better realise that there are various perceptions of the same situation.

Time: from several hours (case study) to one or more days (field work)

Materials: pen and paper; for case studies, handouts A and B of exercise K, handout C of exercise K, whiteboard

Steps

1. Prepare the method applied: write and/or adapt case studies; prepare field work.
2. Explain the exercise to the participants and prepare them for the work to be done (role plays, games, and discussion on various topics for field work).
3. Form small groups and ask them to answer the following questions as a group.
 - a. What are the gender issues within the community according to men and women considering different age groups, classes, castes, religion, and so on?
 - b. What are the opinions about these gender issues within the community? What is your opinion?

4. Ask the groups to present the outcomes in the plenary for discussion. Pay attention to the consequences of the different perceptions observed for further development planning. How do the participants assess the potential for addressing gender issues?

For debriefing of field work, the following questions related to the method applied can be relevant for discussion.

- What method helped you to get the best results? What do you mean by best? Why do you feel so?
- What did you learn about involving other staff of your organisation or outsiders in the research, about ways of motivating them, about their attitude or changes in attitude during their involvement, about the effect of their involvement in the research?
- What did you learn about involving the women and men of the community in the research? How did you motivate them to cooperate? How did they react to your research? Did you have to specially consider certain (groups of) people during the preparation and implementation of the research? What were the effects of your research?

A useful method to stimulate discussion is the role play. Ask the participant to prepare a role play about something that went wrong or right during the field work or anything else they consider important to share with others as a learning experience. It could concern the team work, attitudes shown during interviews, seating arrangements, efforts to build rapport, and so on.

HANDOUTS

Handout of exercise H: Overview of development approaches towards women in relation to men

(Williams, et al. 1994, pp 226)

	Welfare	Anti-poverty	Efficiency	Equity	Empowerment
Cause of the problems	Circumstances that are beyond control	Lack of resources, causing low standard of living	Failure by development planners to recognise women's key role in production, and necessity to involve women	Patriarchy, exploitation, subordination, and oppression of women by men	Women's subordination not only by men but as aspect of colonial and neo-colonial oppression
Goals or purpose	To support motherhood as the most important role for women in society- To relieve suffering	To raise production to ensure poor women increase their productivity- To integrate women into development	To ensure that development is more efficient and more effective 'Feed the nation'	To gain equity for women in development by grafting gender into the development process	To empower women through greater self-reliance- Building new political, economic and social structures- To challenge/ overcome exploitative structures
Service programmes	Famine relief programmes – Family planning – Nutrition (improving family health, especially of children through maternal care) – Activities to meet Practical Gender Needs	Training women in technical skills – Small-scale income-generating activities to meet basic needs (practical gender needs)	Programme that meet PGN in the context of declining social services. Rely on all 3 roles of women and elasticity of time	Organise to reform structures – To meet SGN in terms of Triple Role	Programmes that address themselves to SGN in terms of Triple Role - through bottom-up mobilisation around PGNs to confront oppression
Type of change	FUNCTIONAL CHANGE (Non-challenging)	FUNCTIONAL CHANGE (Non-challenging)	FUNCTIONAL CHANGE	STRUCTURAL CHANGE (Challenging) Equal Rights/ Opportunities	STRUCTURAL CHANGE (Challenging)
Type of leadership	Strong reliance on authority (patriarchal model of social welfare with the modernisation ideology with roots in colonialism)	Consultative - ideological reproduction of values that reinforce patriarchy and women's subordination	Authoritarian/ Consultative. Women seen as resource	Participatory to reform structures – Top-down state intervention to reduce inequality	Enabling, participatory, build solidarity, overcome fear (alternative m/f balanced structures). 'Bottom-up'
Type of service	WELFARE - Assuming women are passive beneficiaries of development.	ANTI-POVERTY - Development (integrating women into development) ~ Poor women isolated as a category. Recognition of the productive role of women	EFFICIENCY- Policies of economic stabilisation and adjustment rely on women's involvement.	EQUITY - Reforming, liberating – Women seen as active participants in development.	EMPOWERMENT Transformation, liberation Largely unsupported by Government or agencies. Slow steady growth of under financed voluntary organisations.
Period most popular	1950-70, but still widely used	1970s onwards – Still limited popularity	Post 1980s - Now most popular approach (ODA, USAID)	1975-85 - Attempts to adopt during Women's Decade	1975 onwards, accelerated 1980s – Still limited popularity



Handout B of exercise I: seeing Ks and Hs

(Pretty et al. 1995, pp192)

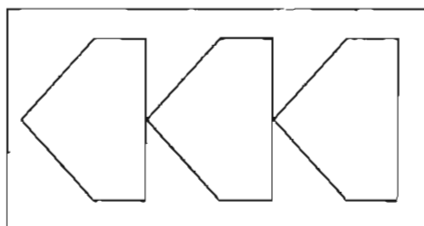
52: SEEING THE Ks OR Hs

✓ **OBJECTIVES** ■ To demonstrate how recent events influence the way we see the world

🔗 **MATERIALS** Flipchart/chalk board

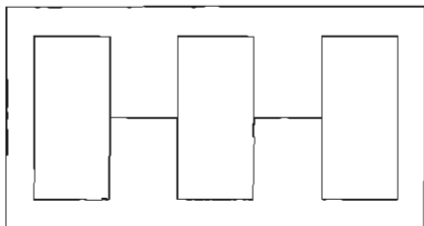
🕒 **TIME** 5 minutes

📌 **PROCEDURE** 1 Exhibit this diagram on a flipchart or chalk board. ▶



2. Ask your group: "What do you see?" The chances are you will get responses like "arrows", "three houses on their side", "increasing importance to the left", "go to the left", etc.

3. When you get the response "two Ks", immediately highlight the two Ks and go on with the exercise by exhibiting the second diagram. ▶



4. Then ask them: "Now what do you see?". Very likely, you will get the response "two Hs" immediately. Now ask the group "Would you have seen the Hs if someone had not first pointed out the Ks?"

💬 **COMMENTS**

It is best to prepare the diagrams beforehand, as the process of drawing them can reveal the Ks and Hs too soon.

Ask the following questions:

- "Why did you see the Hs more easily than the Ks?" (You were conditioned by what had just happened: the eye sees, but the mind evaluates).
- "In your work with people, in what ways is your eye seeing one thing and your mind another?"
- "In your work, have there been occasions when what has recently happened has influenced the way you observed or reacted?"

Source: Edward Scannell and John Newstrom (1983)

Handout A of exercise K: A case study of a village in Western Nepal: the promotion of an income-generating activity

Kamal Rijal

Aruktharka (fictitious name) is one of the poorest villages in Nepal. Like many villages, it has low literacy rates and high infant mortality. Most people are Hindus, and Hinduism is the national religion. In this village, men are usually skilled in construction, business, and professional work, and do the planting, water management, and harvesting. Men also participate in formal politics as community representatives. This includes representation of concerns expressed by women's groups. Women have almost exclusive responsibility for raising their children, cooking, cleaning, and other household work. Women also operate a variety of small businesses. In agriculture, women do the weeding, bring food for the men, and help as needed. Water and fuel are usually collected by women and children.

Project Activities

In this community, women have been sewing and doing embroidery for many generations. Traditionally, they sold some products from their homes, but usually the men took most of it to the market to sell. A local-level NGO came to this community and identified their embroidery work as a productive activity that the NGO might support. The women were introduced to a small machine that could help them do their embroidery faster than would be possible by hand. The NGO promised to train them to use the machine and to let them buy it on credit. With the machine, they would be able to produce much more right at home. Increased production from the use of the machine would enable the women to repay their loans within one year. The people here never did have a problem selling their products. The NGO's feasibility studies showed that there would be a market for their goods.

Impact of Project Activities

Women had received training in using the embroidery machine. At the beginning, women were concerned about control over the additional income due to increase. They were also concerned to pay back their debts. The men quickly realised that transporting more goods to the market was difficult and that it took them a lot longer to sell more. They also became uneasy about the women having access to technology and becoming more skilled while they only worked more and harder. The women, on the other hand, felt that they produced more, but did not benefit from this.

Many women had not made their loan repayments. They claimed that the men simply kept the money. The men felt that, after the purchase of supplies, the additional income was insignificant (prices had dropped as well since the market was loaded with these goods), and that, in any event, they deserved additional income since they were working more and harder than before. The distribution of income within the household was one issue that was destined to become a problem. Loans were given to the woman, but it was the man whose workload increased and men received the cash in the market. Initially, the men encouraged the use of the new technology, but their own assumptions about its impact came into question later as the women became more confident.

Handout B of exercise K: Gender analysis matrix

(Parker, 1993, pp30, 47-49)

The Gender Analysis Matrix: What, Why, Who and When?

WHAT	The GAM is a tool for gender analysis of development projects at the community level.
WHY	<p>The GAM is used to determine the different impacts of development implementations on women and men.</p> <p>The GAM separates out the different impacts on women and men (and other vulnerable groups) so that development practitioners may accommodate the different needs and interests of men and women.</p> <p>The GAM initiates a learning process that values the perceptions of learners about existing gender relations.</p> <p>The GAM encourages critical thinking about gender roles and the different values society places on women's and men's labour.</p>
WHO	<p>The analysis is done by a representative group within the community.</p> <p>Where possible, the group should include women and men in equal numbers. If the culture does not permit women and men to work together, then each gender should meet separately, and the analysis should be shared with the other gender.</p>
WHEN	<p>The GAM can be used in the planning stage, to determine whether potential gender effects are desirable and consistent with programme goals.</p> <p>The GAM may also be used in the design stage when gender considerations may change the design of the project.</p> <p>The GAM is particularly useful for expanding the scope of monitoring and evaluation beyond the stated objectives to address broader programme impact.</p> <p>For monitoring, the GAM can be used to periodically verify expected impacts and identify unexpected results so that they can be addressed.</p> <p>During evaluation, the GAM can help to determine gender impacts.</p>

Handout C of Exercise K: A case study of a village in Eastern Nepal: supply of potable water

Kamal Rijal

In this community of **Sundarpur** (fictitious name) of 110 families, the women had to walk two kilometres down an incline of 15 degrees on a slippery path to get water from the stream. Twice each day, these women walked down the steep, muddy path carrying empty jerry cans, they filled their cans with water and then carried the 20-litre cans on their backs up the steep hill. Every woman fetched water twice a day, even when it was winter, when she was pregnant or sick, or with her little child whom she could not leave behind alone in the house.

Project Activities

In this village, where a local level NGO had worked for seven years, the women rated their difficulty in getting water as their biggest problem. Men, who never fetch water, rated their problem as their fifth priority. Traditionally, in this culture, it is the men who construct wells for collection of spring water, not the women. A committee for potable water was created, which included women and men selected by the community. A well was constructed 5 km away and water was piped to a big tank near the community, so that the houses were only about 100 metres away from the water tap. Today the water project is completed and potable water is easily accessible to everyone in the community.

Impact of Project Activities

The new water source provided potable water. Once the project was completed, men and children began to fetch water, changing the traditional gender division of labour with regard to water collection. Organisational systems within the community were strengthened as systems for collection of payment for water usage were developed. The community worked out payment for use of the water and agreed that four families would be allowed to use the water free of charge because they could not afford to pay for it. Although the women assumed that they would have to pay for the water, the men paid for it since the job of collecting payments fell to a male member of the committee. The new water source provided greater personal security for women. Also, the women did not have to carry their babies to the source. Since it was close enough, they were able to leave small children at home while they went to fetch water. Men spent more time at home during the project construction phase and later were able to market their skills in water system construction and maintenance.

By government requirement the committee used to attend a district meeting at which men from the communities' committees had ridiculed these men because there were so many women participating in the decision-making.

How to Use the Gender Analysis Matrix

In the project planning and design phase

1. Describe the project in a few sentences.
2. Identify the groups that the project is intended to benefit. Be as specific as possible.
3. Restructure the Matrix to ensure that these groups are represented. Keep the Matrix as simple as possible. Do not add more than two sub-categories as that will make the Matrix very difficult to manage over time. The key is to ensure that the Matrix facilitates a process of analysis, rather than serving as a comprehensive database. Leave out the 'Community' category if it does not reflect the complexity of the community with which you are working.
4. Fill out the Matrix by asking what the project's potential impact is on women's time, labour, physical resources, and social and cultural contexts. Next ask the same questions for the men, the household, and the community.

The categories provided in the Matrix may be further sub-divided as needed. For example, labour could be household labour (domestic), productive labour (own business), wage labour (paid for work), and unpaid labour (done out of social necessity).

The question on this category would then be: What effect would the project have on women's household labour, productive labour, wage labour, and non-wage labour?

The most difficult impact to anticipate is in the sociocultural category. In this case, it is particularly useful to look across categories and across the various levels of analysis to determine the interrelationships.

As needed, the levels of analysis can also include (depending on the project goals and the community in question) age group, class ethnic groups, or other relevant categories determined by the analysing group.

5. If there is disagreement among the group about the expected impact, it is okay to note all views even if they are contradictory. The contradiction will be addressed in subsequent analysis and resolved on the basis of actual outcomes.

After all the blocks have been filled in, determine whether the effect listed in each box is desirable or not with respect to your programme's goals.

If it is consistent with your programme goals, mark it with a minus (-) sign. If you are uncertain, identify it with a question mark (?)

6. Use the signs as a visual picture of the areas where expected impacts will be consistent with programme goals, and areas where impacts may be contrary to programme goals.

DO NOT add up the signs to determine net effect.

The Matrix does not determine questions of equity; it simply separates out the potential impact of a particular activity. In each particular context, it is the analysis (the community group doing the analysis) that decides whether the potential consequences of a particular project are desirable.

7. Consider the effects on those who do not participate in the project. Will they also benefit, or will they lose? What adjustments can be made to prevent a negative result for those who cannot or do not wish to participate?

In the monitoring and evaluation phase

1. Review the analysis and verify the expected impact at least once a month for the first few months of a project, and at least once every three months thereafter.
2. Identify unexpected results so that they may be addressed.

Notes: 1. This tool should not be the sole means of decision-making. It should be used in addition to other standard tools. 2. The completion of the GAM can take two to four hours, especially during the first few analyses. Often it is difficult for women to leave their work for such a long time. In such cases, it is possible to do two categories at a time. The goal is to ensure that both sexes have taken part in the analysis.

Gender Analysis Matrix

Project Objectives

	Labour	Time	Resources	Culture
Women				
Men				
Household				
Community				

1. Are the effects listed above desirable? Are they consistent with programme goals?
2. How will this activity affect those who do not participate?
3. Unexpected results - to be identified during implementation.



Part 2 Organisations and Gender

INTRODUCTION

In this part we focus on organisational change and gender. The key issue we address concerns the process of how to make organisations gender-friendly - organisations in which both men and women feel at ease in their work and working environment, both find equal opportunities and benefits, and in which actions are purposely taken to reach and maintain this situation. In order to address this issue insight and knowledge are required in the key concepts of organisational change and gender. Moreover, knowledge and skills are needed to analyse the gender situation in an organisation and to plan, monitor, and evaluate the process of change. One of our key tools is the so-called 'Nine Boxes Organisational Framework', described in Section 1 of this part. Besides being a tool to help understand organisations, it can be used for analysing, planning, monitoring, and evaluation purposes.

In Section 1 we pay attention to the relationship of gender to organisations and the importance of paying attention to gender in organisations. Section 2 deals with organisational gender analysis: how to assess gender within an organisation. In Section 3 we focus on the concepts and processes of organisational change in relation to gender. We make use of definitions and certain tools from the field of organisational development and organisational change. Exercises to gain insight, knowledge, and skills have been specifically developed for the training.

Section 1: Understanding Gender and Organisations

As gender is an inherent element of every household, community, and society, it is also a feature of organisations: certain roles, responsibilities, rights, and identities are ascribed to male and female staff based on values and norms about men and women. As in society, we can observe distinctions in organisations between men and women of different classes, ethnicity, caste, and age groups. Even organisations with only male or female staff display values and norms distinguishing men from women. Before we enter into more detail about gender and organisations, we have to be clear about the concept of organisation.

The concept of organisation

People are the essence of organisations. They are 'organised' in a certain manner with the apparent aim of achieving a common purpose and they undertake rational coordinated activities to that end. Their behaviour is guided and constrained by certain persistent, but changeable, rules that are specific to that particular organisation. These rules refer to roles and relationships of people and to structural elements such as position and procedures. Newcomers to the organisation are socialised to apply the rules without questioning – a process about which people usually are not aware.

Our dictionary

Organisation refers to the rational coordination of activities by a group of individuals with the aim of achieving some common purpose. Through these activities certain products are produced, and these can vary from water pumps to development programmes.

Organisational elements

All organisations have certain elements in common. We distinguish nine elements: policies and action, tasks and responsibilities, expertise, policy influence, decision-making, room

for manoeuvre/innovation, organisational culture, cooperation/learning, and attitude.² The first three are termed the **Technical Dimension** of an organisation and include the technical, financial, and social resources. A first element of this dimension is **Policies and Action**: an organisation needs a policy to guide the actions and activities of the organisation.³ This overall policy is operationalised in work plans and strategies, for which a budget is made available. To know to what extent aims are being achieved, monitoring and evaluation systems are designed. The overall policy is often described in a statement of the goals, vision, or mission of the organisation. Action plans, budgets, results, and so on are found in annual plans and reports.

Structure is required to make the planning and implementation of policies and activities possible. The second element of the technical dimension deals with structural aspects, which can be called **Tasks and Responsibilities**. People work according to specific responsibilities and tasks and follow procedures and instructions to streamline actions. They work in teams, units, departments, and the like, which may be ordered in levels of hierarchy. Organisational structure is often depicted in an organogram. The units are connected through coordination, communication channels, and information systems. How these channels are supposed to be used can be found in administrative rules.

Central to the functioning of an organisation is the available **Expertise**, a third common element of organisations. A certain number of qualified staff is required to implement activities. In most cases organisations are not homogenous: gender, class, ethnicity, and age, to name the most important, create diversity. Job descriptions guide the staff members in their work. Some organisations have a wide variety of job descriptions, others a limited number. Appraisal systems are put in place to see if and how the staff perform. Training can be considered to update skills and knowledge. More staff may be recruited if need arises. Physical infrastructure and facilities exist to do the work: rooms, training halls, canteens, transport, crèche, and so on. All these aspects have to do with the expertise available in terms of people to run the organisation.

Another set of three elements concerns the processes to make and to keep the organisation functioning. In these processes people - staff and people outside the organisation - are involved. Thus, we speak of interactive processes. They basically deal with the allocation of organisational power and benefits. The elements belong to what we call the **Socio-Political Dimension of an Organisation**. Since a variety of people influence the policy an organisation adheres to and its actions, the first element of this dimension is called **Policy Influence**. Obviously, management plays an important role, but so also do members of the Board of Directors, donors, influential people within and outside the organisation, people from the target group or clientele, among others. Their influence can be through formal or informal processes. Apart from policies, these interactive processes can concern or affect positions, instructions, recruitment, facilities, and so on; items we have already mentioned under the technical dimension.

A second process-related element is **Decision-making**, an important element of an organisation that contributes to its consistency and cohesiveness. Decisions affect the whole running of the organisation from planning and resource allocation to control and

² These nine elements and the way they are ordered (see below) are adapted from Tichy (1982)

³ A policy can be defined as a statement of a goal that comes from a particular perspective on a problem situation and incorporates guidelines for action. It documents what the organisation is trying to achieve and it proposes to achieve it. It provides an overall framework guiding the actions of an organisation (Plewes and Stuart 1990)

conflict management. All organisations show patterns of decision-making, both formal and informal. In the interactive processes, staff members of different levels and with a variety of tasks and responsibilities can be involved. In some organisations it will be a restricted group, in others it may include the whole staff. Sometimes informal processes or leaders may appear more influential in decision-making than the formal ones.

The extent to which individual staff members participate in discussions and decision-making is one way of indicating her or his **Room for Manoeuvre/Innovation**, a third element related to interactive processes or the socio-political dimension. It refers to the degree of autonomy, allowance for innovation and encouragement given to those who aim to learn and increase their capabilities within the boundaries of the work environment. Organisations make certain space available for individual staff members in order to motivate them to work for the organisation and to take part in processes. This is usually done through reward and incentive systems and career opportunities. Some organisations approve ample space for innovation or a diversity of working styles, others give staff little room for creativity. In most organisations differences in 'space' according to gender, class, ethnicity, and age exist: they can provide opportunities or, on the contrary, form barriers to enhance one's career, to do field or desk work, and so on. Often staff create their own spaces by engaging in activities other than those narrowly defined by their job descriptions in pursuit of interests they consider to be of importance to the organisation or their own self interests. This may include trying to influence the boss or colleagues on matters related to organisational policies, or even in resisting policies that are felt to be inappropriate. Staff members actively involved in processes of change often purposely try to expand the limits of their space to create more room for manoeuvre to pursuing their point. The particular room for manoeuvre in an organisation is often reflected in leadership styles.

The last set of three organisational elements concerns elements essential to its continuity and change. They form the **Cultural Dimension of an Organisation** because they relate to the patterns of thinking, feeling, and acting based on values and norms, which are to some degree shared by staff, that enable the organisation to continue functioning. The culture of the organisation shapes the different organisational elements and is therefore rightly called the 'personality'. Values and norms, for instance, are reflected in the organisation's mission and in its strategy; they determine procedures, the way information flows, the way the organisation is structured, the selection of new recruits, appraisal of staff members, the channels for exerting influence, the patterns of participation, the manner of conflict resolution, the space for creativity, and criteria for rewarding staff. Moreover, the patterns of thinking, feeling, and acting are characteristic of an organisation, to some degree distinguishing it from another.

The first element of the cultural dimension is the **Organisational Culture**. It refers to various key norms and values indicating what the organisation stands for and how it wishes to operate. They are expressed in its logo, brochure, building style, portraits or paintings, furniture, crèche, dress code, and other symbols. These symbols give an image to the organisation – to outsiders and to staff with which to identify themselves. Norms and values are reflected in the way staff greet each other and outsiders, the type of jokes and comments they make, topics of private talks, eating arrangements, and the like. Perceptions about what is important and who is important belong to the organisational culture. For instance, the commitment to work shown by staff members indicates who is considered a 'hero' of the organisation (the staff member who works from 9 to 3, from 9 to 9, etc); standards of work indicate what is considered high quality. The culture of an organisation does not necessarily have to be homogenous. Depending on the size and type

of organisation, but also on its staff diversity in terms of gender, class and ethnicity, sub-cultures may exist. There is often a dominant culture and at least one sub-culture existing in organisations.

Norms and values are, furthermore, mirrored in the way people relate to each other within and outside the organisation. They are reflected, for instance, in the value given to team work, in support to staff members, in contacts with other organisations and networks. We speak of the organisational element **Cooperation/Learning**. Cooperation relates to both vertical and horizontal relations: the way staff of different levels work and relate to each other and the (working) relationships between staff of the same level. Cooperation also links the organisation with outsiders – both individuals and organisations. Cooperation could have a learning effect through the exchanges that take place between people from within and, also, with those outside the organisation – that is why we have linked both concepts. Values given to certain leadership styles, forms of leadership, and sources of leadership play a role in shaping relations and exchange. An organisation, for example, can value the inputs of different professionals through a system of rotational chairpersonship.

Organisational norms and values are to a certain extent shared by its members, as a result of a socialisation process people go through when they start working at the organisation, but we must also pay attention to the psychological aspects of the individual. We call this the organisational element **Attitude**. It is an important element because it relates to the extent of staff's identification with the dominant culture of the organisation and therefore with his/her acceptance of the norms. Attitude refers to the way an individual staff member feels and thinks about his/her work, the working environment, the organisation and about other staff members. These perceptions are reflected in staff's behaviour. For example, the degree to which staff members feel that they have to behave in conformity with rules and procedures will affect their attitude and behaviour, either in a positive way or in a negative way. Some may feel secure in the knowledge that following the rules will not lead to unpredictable situations. Other staff members who would like to try an innovative approach feel inhibited by the existing rules. How staff feel is reflected in the degree of commitment and dedication they bring to the work; their motivation to participate or cooperate; their openness and willingness towards change, and their perceptions of other people's behaviour, working style, ideas, and so on. Dissatisfaction or identification problems are factors that can contribute to changes within the organisation.

Organisational elements framed together

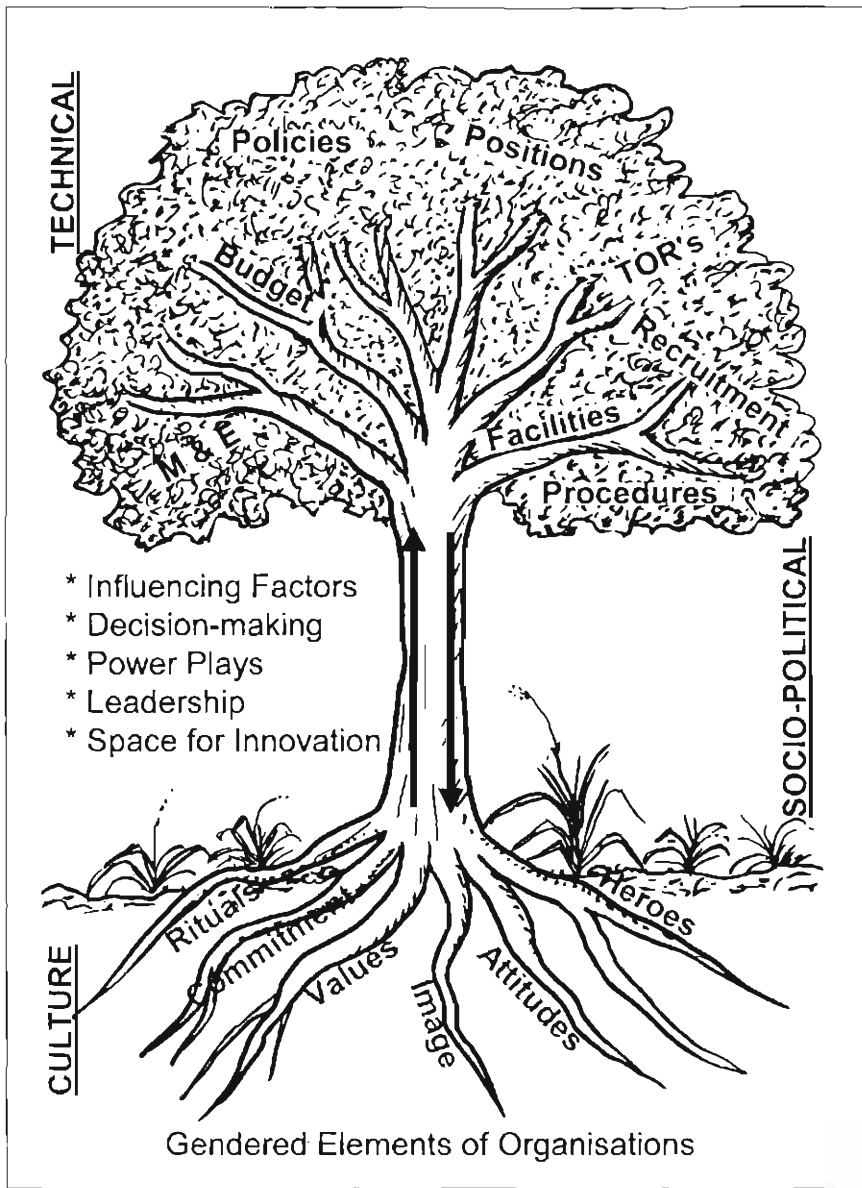
Any organisation has the whole set of described elements and it is the inter-relation between them that characterises it. The elements organisations have in common can be ordered in various ways. Here we present the so-called 'Nine Boxes Framework' which illustrates the inter-relation between the elements (see Table 1). The framework is a matrix of three columns and three rows. The three rows indicate the three different dimensions of an organisation: the **technical, socio-political, and cultural dimensions**. They form the building blocks for an organisation's functioning. The three columns refer to three basic characteristics of an organisation: **'mission/mandate', 'structure', and 'human resources'**. People work in a certain structure to achieve the mission or mandate of an organisation. This guides and also sets boundaries for the activities of that organisation. Structure has to do with the division and grouping of tasks, authorities, responsibilities, and conditions and agreements related to the manner in which information, communication, and decisions are processed. Organisational change occurs in one or more of these areas.

Table 1: Organisational Framework

ORGANISATIONAL DIMENSIONS	ORGANISATIONAL CHARACTERISTICS		
	MISSION/MANDATE	STRUCTURE	HUMAN RESOURCES
TECHNICAL DIMENSION <i>The tangible parts</i>	I. POLICIES AND ACTIONS The guiding policy and its operationalisation in action plans, strategies/ approaches, and monitoring and evaluation systems	II. TASKS AND RESPONSIBILITIES The way people are positioned and the way tasks and responsibilities are allocated and related to each other through procedures, information and coordinating systems.	III. EXPERTISE The number of staff and the requirements and conditions to allow them to work, such as job description, appraisal, facilities, training, etc
SOCIO-POLITICAL DIMENSION <i>The process or power play</i>	IV. POLICY INFLUENCE The way and extent management, people from within the organisation and people from outside the organisation influence policy and the running of the organisation.	V. DECISION- MAKING The patterns of formal and informal decision-making processes – The way diversity and conflicts are dealt with.	VI. ROOM FOR MANOEUVRE / INNOVATION The space provided to staff (through rewards, career possibilities, variety in working styles) or created by staff to define their work.
CULTURAL DIMENSION <i>The personality</i>	VII. ORGANISATIONAL CULTURE The symbols, rituals, and traditions. The norms and values underlying the running of the organisation and the behaviour of staff. The social and economic standards set.	VIII. COOPERATION/ LEARNING The way the work relations between staff and with outsiders are organised, such as working in teams, networking. The norms and values underlying these arrangements	IX. ATTITUDE The way staff feel and think about their work, the working environment and about other employees – The extent to which staff stereotype other staff – The extent to which a staff member identifies him/herself with the dominant culture of the organisation

The three elements of the technical dimension are all visible. We can see that an organisational policy, action plan, task, unit, position, recruitment policy, appraisal system, schedule, and so on exists from documents, brochures, annual reports, wall boards, name tags, and the like. Looking from the vantage point of an outsider to an organisation – and this may even apply to many within the organisation - we do not know if and how these technical elements are used or function. Is an action plan or policy implemented, is a schedule followed, is a unit functioning? It will to a great extent depend on how people within the organisation interact with each other and, perhaps, with certain outsiders. In each organisation patterns exist for people to interact - some are formal, others informal, some are purposely created, some develop gradually through actions and reactions of people. This brings us to the socio-political dimension. The interaction processes are visible only to a certain extent. We can see who participates in board meetings or team meetings, or who talks to whom in the corridors or canteens, and who visits the manager and we can read minutes of meetings. Less clear to outsiders are the informal lines of communication. Also, how personal liking, individual behaviour, and perceptions of ‘the other’ shape patterns of relations is many a time imperceptible. Often only the people immediately concerned know what the informal talk is about and the significance and effects of discussions and behaviour. Elements of the last dimension, the culture dimension, are the least visible. People working in an organisation are usually hardly aware of the organisational values, norms, and behaviour. They mostly take them for granted.

As we did for the concept gender we can also use the tree to visualise an organisation.



Gender and organisation

The Nine Boxes Framework (p45) can help us to better understand how gender is embedded in organisations. In a mixed organisation, men and women perform tasks and responsibilities and carry out jobs (Boxes 2 and 3) based on gender roles and are valued according to certain norms (Boxes 7, 9). These norms and values influence the way and extent women and men have access to positions (Box 2), facilities, training (Box 3), rewards and career opportunities (Box 7), to decision-making processes (Box 5) and policy influencing mechanisms (Box 4). Together they make up the power structure of an organisation

showing the power relations between men and women. Organisational norms and values are to a great extent rooted in the dominant societal norms and values. Organisations are **gendered**, by which we refer to the process by which women and men learn and act out the different qualities as per socially assigned and accepted roles. In many organisations, for instance, women are secretaries, carrying out supportive tasks given to them by male employees, and men are heads of departments, according to the accepted norms of a particular society.

Our dictionary

A **gendered organisation** is an organisation in which women and men perform roles and tasks, fulfil positions, and are valued according to their socially assigned and accepted roles.

Organisations, however, have norms and values of their own, which in varying degrees differ from those dominant in society. The organisation's founders and the top management succeeding them have a great effect on its culture which to a great extent reflects their vision, beliefs, assumptions, and behaviour. Male and female staff members learn – often unconsciously – through a socialisation process to act according to the organisational norms and values: the clothes to wear, the way of greeting and approaching male and female subordinates and bosses, the language and jokes which are allowed to be made, the staff members one can interact with formally and informally, and so on. But the influence of organisational norms and values is already present before people enter the organisation: it starts with the selection of new employees. Candidates are often unconsciously judged through the subjective views of selection committee members as to how well the man or woman will fit into the organisation.

Most but not all staff will identify themselves with the dominant culture of the organisation. There can be big differences between male and female staff regarding their level of identification with the organisation depending on the extent to which they feel accepted and their organisational gender needs are being addressed. We can distinguish between practical and strategic gender needs related to the condition and position of female staff relative to male staff.

Our dictionary

Practical organisational gender needs arise from the division of jobs, tasks, responsibilities, and access to resources (facilities, training, and so on.). They relate to the **condition** of men and women in the organisation, i.e., the circumstances in which they carry out their responsibilities — such as facilities (working space, canteen, child care, transport, toilets, and so on.).

Strategic organisational gender needs arise from unequal relations, opportunities and control over resources. They relate to the **position** of men and women in the organisation and, thus, to power, status, and control over decision-making and resources.

The level of awareness about gender roles and relations differs per organisation and among staff members. In some organisations all staff members are fully aware of inequalities in the way power is distributed and take measures to overcome this situation. In

others different roles and relations are accepted as logical reflections of how society is organised. In Table II a continuum about the extent of attention paid to gender in organisations is presented to help recognise the situation in one's own organisation.

Gender inequality in organisations and programmes: two sides of the same coin

The organisational norms and values concerning the roles and relationship of men and women are – consciously or not - reflected in the policies and actions of organisations and, thus, in their products and programmes. There is a direct though often invisible link between the attitudes of male and female staff members about gender roles and relations at the organisational level, on the one hand, and the impact of their programme activities on women and men at the community level on the other. Interestingly, in many organisations more attention is paid to gender needs in development programmes than to gender needs in their organisation. For instance, a programme can aim at women's empowerment, but female staff may be absent at the higher levels or hardly any facilities exist to enable them to carry out field work. It can certainly be assumed that organisations with a low degree of internal gender inequality will contribute to more sustainable and equitable development at the community level. Addressing gender inequalities not only benefits the programmes but also the organisation itself – an important reason to pay attention to gender at the community **and** organisational levels. Evidently this requires a certain awareness about gender and willingness to critically analyse one's own organisation – something that is not commonly found.

Table 2: Continuum: extent of attention paid to gender in an organisation

I	II	III	IV	V	VI
The organisation reflects the roles and values of men and women in society. Both men and women are employed but work in different positions and do different types of work.	In the organisation it is recognised that there are differences between men and women in terms of access to opportunities. It is also realised that men and women have different perceptions and interests. Problems resulting from this situation are identified.	In the organisation it is recognised that there are underlying and hidden causes of inequality between men and women, which are being identified. The observed differences are felt undesirable and unjustifiable.	In the organisation willingness exists to take action to reduce undesirable and unjustifiable differences between men and women.	In the organisation actions and measures are taken at all levels to assure a fair and just distribution of tasks, responsibilities, resources and benefits between men and women in the organisation.	In the organisation both men and women feel at ease in their work and working environment and have equal opportunities. Efforts are taken to maintain this situation.
Gendered organisation -->	Gender-aware organisation ---->	Gender sensitive organisation ---->	Gender-responsive organisation ---->	Gender-equitable organisation -->	Gender-friendly organisation

FURTHER READING

On concepts concerning organisation and gender

- Goetz, A.M. (1997) 'Managing Organizational Change: The 'Gendered' Organisation of Space and Time'. In *Gender and Development*, 5: 1
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- Kolb, D.A.; Osland, J.S.; Rubin, M. (1995) *Organizational Behavior: An Experiential Approach*. New Jersey: Prentice Hall, Inc
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EXERCISES: GENDER AND ORGANISATION

Although the sequence of the exercises follows a certain logic, the trainer can choose the exercises fitting the particular training or workshop. For instance, we used to start with exercise C to make the step from gender inequality at programme level to gender inequality at organisational level. We experienced that it is necessary to show the direct relationship between both levels for the participants to understand the importance of dealing with gender and organisation and organisational change.

A. Creating awareness about gender and organisation

Aim of the exercise: to create awareness about how gender is reflected in materials, procedures, rules, opportunities, decision-making patterns, and so on in the organisation.

Time: 30 minutes

Materials: Pen and paper, whiteboard

Method: reflection, discussion

Steps

1. Explain the concept organisation and its main elements (see Part 2 - Section 1 above).
2. Ask the participants to reflect in small groups how gender is reflected in materials, procedures, rules, opportunities, decision-making patterns, and so on in their organisation. Refer to the discussion about gender and the gender wheel: gender roles, valuation, and so on. Ask them to make notes of the discussion.
3. Discuss the outcomes of the group discussions in the plenary. Relate the items mentioned by the participants to the Nine Boxes Framework.

B. Gender in one's own organisation

Aim of the exercise: 1. to create insight into the extent of attention paid to gender in the own organisation. 2. To become aware of the different actors and factors that played a role to create this situation.

Time: 60 – 75 minutes

Method: reflection through guided questions, discussion

Materials: Pen and paper, whiteboard — handout: Table 1 (Organisational framework)

Steps

1. Explain the background of the exercise. Point out that some of the participants may know when for the first time attention was paid to gender in their organisation, others may not because it happened before they started to work at the organisation.
2. Ask them to answer individually the following questions. Let them write the answers on a piece of paper. Hand out the organisational framework (Table I) to help them to get ideas.
 - a. When was 'the first time' that attention was paid to gender in your organisation (note: we do not mean in your programmes or projects!).

- b. Who played major roles in initiating this attention to gender and expressing the need to take action?
 - c. In which 'box' of the framework did the first action on gender in your organisation take place?
 - d. Did changes take place in other organisational elements (boxes) as well? Explain. Indicate the boxes in which effects took place.
 - e. Which internal and/or external factors played a role in this whole process?
3. Ask participants to discuss the outcome in small groups. Have them assess the extent of attention paid to gender in each organisation and offer their opinions on this (i.e., did you like it or not, was it sufficient, and so on). Why do they feel so?
 4. Discuss the outcomes of the groups in the plenary. Refer to the continuum (Table 2) if relevant.

C. Understanding the relation between gender in programmes and gender in organisations

Aim of the exercise: to understand that gender at the organisational level should be addressed in order to promote equitable and sustainable development programmes.

Time: 45 – 60 minutes

Method: reflection, discussion

Materials: Pen and paper, whiteboard — optional: a case study about a development programme/project

Steps

1. Explain the background of the exercise: the importance of considering gender inequalities at programme level and organisational level (see text above). Ask each participant to reflect on the following question: 'How should you adjust the programme(s) of your organisation to better address gender needs arising from the conditions and positions of female and male community members?'
2. Form small groups to exchange ideas. Ask them to reflect on the question: 'What conditions are necessary for the implementing organisation to implement your ideas?' Let them write 3 – 5 important issues arising from their discussion on a flip chart.

Give some examples, for instance:

- if the programme adjustment concerns change of methods of needs' assessment; the organisational conditions could be — the organisation should have capable staff to do a needs' assessment and be able to meet at least some of the needs expressed by community members;
 - if the programme adjustment concerns addressing other types of key areas in the programmes the organisational conditions could be — changes in budget allocations should be feasible, cooperation with other institutions or departments is required;
 - if the programme adjustment concerns other allocations of money and time the organisational conditions could be — bosses have to favour ideas to address gender issues and to take action accordingly; and
 - if the programme adjustment concerns change of staff composition to include more women the organisational conditions could be — more women-friendly ways and procedures of recruitment should be introduced.
3. Discuss the outcomes of the group discussions in the plenary.

D. Addressing gender in organisations

Aim of the exercise: to better understand the complexity of addressing gender in an organisation

Time: 2 - 2 ½ hours

Method: discussion based on a case

Materials: Pen and paper, whiteboard — handout of exercise D (the article 'Best Practices for Gender Integration in Organisations and Programs')

Steps

1. Form three groups. Each group will discuss issues related to one of the three basic organisational characteristics: mission/mandate, organisational structure, and human resources. Give each group part of the article which deals with these characteristics (handout) as follows.

Group 1: mission/mandate - gender policies and programming (I - A and B), support for gender integration from senior management (V)

Group 2: organisational structure - gender focal point or committee (III), gender equity in internal management policies: representation of women in senior and field management positions (VI A)

Group 3: human resources - gender integration training (IV), gender equity in internal management policies: gender and recruitment (VI B) and family-friendly employment policies (VI C)

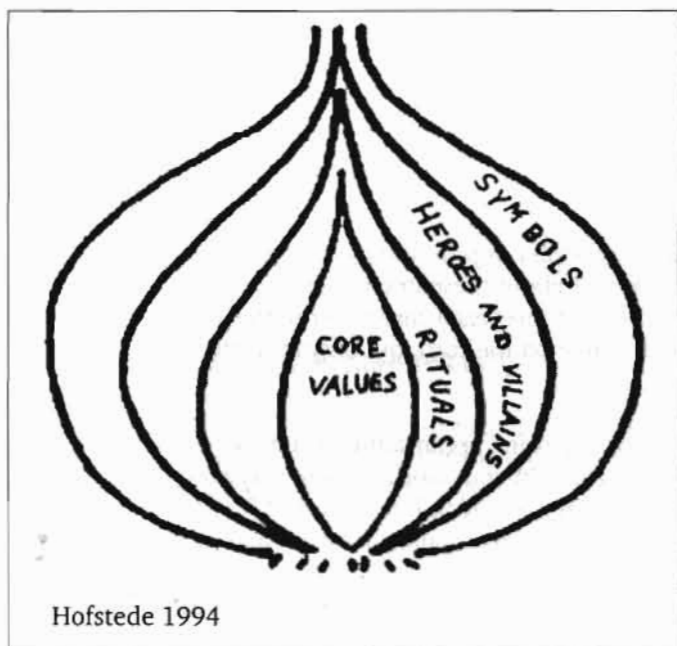
2. Ask them to discuss the following questions in the group after reading the material
 - a. Do you agree with the statements at the beginning of the paragraphs? Why or why not?
 - b. Discuss the findings/approaches - which ones would you like and which ones would you not like to be implemented in your own organisation? Why?
 - c. What kinds of changes in the organisation related to gender do you think will take place due to the introduction or implementation of the practices/approaches mentioned?
3. Discuss the major outcomes of the groups in the plenary session.

E. Understanding organisational culture and gender – symbols, heroes and rituals

Background

Organisational culture can be defined by the particular pattern of thinking, feeling, and acting shared by most members of the organisation. Culture is difficult to see, especially when one is part of the organisation. Hofstede (1994) has symbolised organisational culture as an onion with different layers: symbols, heroes, and rituals. The central part of the onion symbolises the organisation's core values. By peeling the onion, culture becomes more visible. Examples of symbols are the size and look of building, furnishing of offices, clothes people wear, parking places (showing 'who is

important') and common language/jargon. Examples of rituals are how staff members eat, birthday celebrations, ways of greeting, the way meetings are organised, ways of talking about private/business affairs, and so on. Heroes symbolise the behaviour that is felt desirable. Culture can be learned through stories of founders, important people, managers, and so on.



Aim of the exercise: to get a better insight into the culture of the participant's own organisation and the way cultural practices may differ between men and women.

Time: 45 minutes

Method: reflection and exchange

Materials: flipcharts, markers, whiteboard

Steps

1. Explain organisational culture and show the onion (see above given background).
2. Ask participants to write terms and abbreviations, which are specific to their organisation, on a flip chart.
3. Ask them to show to the flip chart to the others. Point at the difficulties in understanding each other and the socialisation process staff go through to 'learn the jargon'.
4. Ask each participant to reflect on heroes and rituals in their organisation and to consider the following questions individually.
 - a. Do you think that the heroes of the organisation are appealing to both men and women? Explain.
 - b. To what extent do men have access to rituals and to what extent do women?
 - c. To what extent do men take part in rituals and to what extent do women?
5. Ask them to discuss the answers in small groups and/or in the plenary session.

F. Understanding organisational culture and gender – core values

Aim of the exercise

To increase insight into the culture of the participant's own organisation and how norms, values, and behaviour regarding and between men and women can differ

Time: 45 - 60 minutes

Method: game with cards and discussion

Materials: Markers — Cards, whiteboard or wall, list of questions – see below

Steps

1. Explain the exercise: every organisation is characterised by certain norms, values, and behaviour. To find out about these in one's own organisation a few questions will be asked. Each participant receives a card to write the answer. The participant should not write his/her name on the card, but only indicate the sex with a male or female sign.

Possible questions for exploring organisational culture

- a. What gets rewarded in your work and the way you perform your work (e.g., a report and the speed at which it is written)?
 - b. Are there any difficulties in balancing work and personal/family life? If so, give an example.
 - c. What is the biggest mistake one can make? What kind of mistakes are not forgiven?
 - d. Which work problems can keep you awake at night?
 - e. How are good employees rewarded?
 - f. What kind of behaviour does not fit your organisation (think of a person who did not appear to fit because he/she did something that was not felt accepted or not done in the organisation)?
 - g. What kinds of people are not likely to advance quickly in their career in your organisation?
 - h. Is there anything that cannot be talked about? Give an example.
 - i. Is teamwork appreciated a bit, very much, or not at all?
2. Ask and discuss questions one by one. After a question is posed each participant writes an answer on a card. Collect the cards and read the cards aloud. Discuss the answers when required. Point especially at the gender dimension: do women answer differently from men? What can we learn from the responses about how gender is reflected in organisations?

G. Understanding organisational culture and gender – organisation's cultural elements

Aim of the exercise: To increase insight into how men and women may feel and act differently in an organisation

Time: 60 – 90 minutes

Method: reflection, discussion

Materials: Pen and paper, Whiteboard, Handout of exercise G

Steps

1. Explain the exercise and give the handout with questions to the participants.
2. Ask each participant to assess her/his organisation's actual position for each of the six organisational culture elements and to reflect on the questions related to gender.
3. Form small groups to exchange views. Ask them to draw 3 major conclusions from their discussion.
4. Discuss the outcomes of the groups in the plenary.

Variation

The exercise can take quite some time depending on the level of awareness of the participants. Instead of six, three or four elements per group can be selected for discussion.

H. Making an organisation woman/man friendly

Aim of the exercise: 1. To increase insight into practices and procedures that affect how men and women feel and act in an organisation 2. To increase the participant's awareness about her/his views on how a gender-friendly organisation would look

Time: 60 minutes

Method: discussion with case

Materials: Pen and paper, whiteboard, handout of exercise H (Making an organisation woman/man friendly)

Steps

1. Explain the exercise and stress that the handout represents only one example of a woman-friendly organisation. Give the handout to the participants.
2. Ask them to discuss the following in a small group.
 - a. With what elements do you agree? Why?
 - b. With what elements do you disagree? Why?
 - c. What more measures could be taken (i.e., elements could be added)?
 - d. Do you feel that such an organisation is automatically man-friendly? Why or why not? Should more measures be taken (i.e., elements to be added) to make the organisation also man-friendly?
3. Discuss the outcomes of the small group discussions in the plenary session.

HANDOUTS

Handout of exercise D: Best Practices for gender integration in organisations and programmes

(Hamerschlag and Reerink 1996, pp 3-21)

Summary of Survey Results on Gender Integration in Programming and Management Policies among 30 InterAction Member Agencies

Key Issues for Gender Integration

InterAction Member Agency Practices

✓	Gender Policy Statement and Consultation with NGO Partners	<ul style="list-style-type: none"> About 30% had policies or were in the process of developing them; only 15% of the agencies reported working closely with NGO partners in development of the policy.
✓	Gender Integration in Program Planning <ul style="list-style-type: none"> <i>Collection of Disaggregated Statistics</i> <i>Gender Analysis</i> <i>Consultation with Local Women NGOs</i> 	<ul style="list-style-type: none"> 30% collected gender disaggregated statistics consistently, while 25% did so occasionally. Only about 10% incorporated gender analysis by mandate; another 50% did so occasionally, mostly in the case of women-specific programming. 16% consulted regularly; and 30% did so when local groups were readily available.
✓	Centralized department, gender unit or focal point to promote integration	<ul style="list-style-type: none"> 40% reported having a staff person or unit focused on gender or women's issues.
✓	Gender Integration Training	<ul style="list-style-type: none"> 30% offered gender training, but with few tools and methodologies offered for follow up.
✓	Evaluation of Gender Impact	<ul style="list-style-type: none"> 40% evaluated gender impact or women's involvement in projects.
✓	Gender Equity in Recruitment, Hiring and Retention <ul style="list-style-type: none"> <i>Representation of Women in Senior and Field Management Positions</i> <i>Gender Awareness In Job Interviews and Selection Process</i> <i>Barriers to Women's Advancement</i> <i>Recruitment and Equal Opportunity Policy</i> 	<ul style="list-style-type: none"> 34% reported that women constitute more than 50% of senior management; 30% reported that women constitute more than 50% of all field directors. 20% reported that demonstrated gender awareness was an important criterion in personnel selection. 30% identified barriers to women's advancement including church based traditions, hiring biases, pay equity issues and cultural impediments. All had equal opportunity policies; 23% made special efforts to recruit women.
✓	Family Friendly Work Policies <ul style="list-style-type: none"> <i>Parental Leave Policy</i> <i>Child and Dependent Care</i> <i>Flexible Work Arrangements</i> 	<ul style="list-style-type: none"> All reported having a three month leave policy, most without pay. Few offered paternity leave. 50% had provisions for child or dependent care, including flexible spending accounts. 92% provided opportunities for flexible work arrangements including flexitime, flexiplace, telecommuting, job sharing, and part-time work

A Checklist for Gender Integration in Programming and Management

The following checklist includes critical elements for integrating gender in organizations and programs. The list grew out of the 1995 survey of InterAction member agencies' "best practices" and is designed as a tool for planning and monitoring progress.

Gender Policies and Programming

- ☒ **Gender policy statement**
 - basic assessment of the problem
 - description of values, principles and mission that will guide the organization's policy
 - intent for applying policy throughout different sections of the organization
- ☒ **Staff and NGO partner organization participation in development of gender policy**
- ☒ **Demonstrated commitment from CEO and senior management to gender policy**

Gender Integration in Programming

- ☒ **Program planning and project design**
 - collection of gender disaggregated data: time allocation and labor (productive, reproductive and community)
 - gender analysis or gender needs assessment
 - assess the participation of men and women in programs
 - assess impact of project interventions on men and women
 - assess different roles, responsibilities, and needs of men and women, including access to and control over resources and decision-making at household and community levels
 - consultation with local women's organizations
- ☒ **Implementation**
 - stated procedures for incorporating gender concerns into projects
 - gender balance of local personnel, enhanced participation of women, gender training, established mechanisms for addressing male opposition to women's activities
- ☒ **Monitoring and evaluation**
 - measuring impact and benefits for women and men; women's welfare and participation; women in leadership positions; women's control over resources and decision-making; changes in attitudes of men and women at household and community levels; enlistment of male participation, support and consent.
 - monitoring and evaluating teams should have gender balance
- ☒ **Centralized department, gender unit or focal point**
 - provides gender training and programmatic support, promotes gender perspective in programs and organization
- ☒ **Assigned staff responsibility within different departments, linked to the centralized gender unit or focal point**

Gender Integration Training

- ☒ ***Training for gender awareness, sensitization, planning and analysis***
- ☒ ***Follow up training with specific tools and methodologies for Institutionalizing the integration of gender concerns throughout the organization***

Gender and Recruitment

- ☒ ***Equal opportunity policy***
- ☒ ***Gender awareness included in job descriptions and as job recruitment and performance criteria***
- ☒ ***Balanced representation of women and men in senior management positions at headquarters and in the field***
- ☒ ***Proactive hiring strategies to recruit women into senior management positions***
 - advertising through channels likely to reach more women
 - encouragement and provision of training for women to move from mid- to senior level positions

Family Friendly Work Policies

- ☒ ***Flexible working arrangements***
 - flextime and flexiplace
 - part-time and job sharing working arrangements
 - encouragement of men and women employees to take advantage of flexible work arrangements, including senior managers
- ☒ ***Maternal and paternal leave policies***
- ☒ ***Childcare and dependent care leave and support***

I. Gender Policies and Programming

Developing a policy statement on gender and development is an important step in promoting gender equity in programs and within an organization's structure.

A. Components of a Gender Policy Statement

A gender policy statement affirms an organization's commitment to gender equality in programs and organization policy and usually includes: 1) basic assessment of the problem; 2) description of values, principles and mission that will guide the organization's policy; 3) intent for applying policy throughout different sections of the organization; 4) clear goals, strategies and guidelines for implementation. It may be a separate policy document or integrated into the existing policy document.⁴

Findings: 20% (6) of the organizations surveyed indicated having a gender policy statement or a statement pertaining to women and development. Four of the organizations have developed a separate statement, while the remaining two state a commitment to gender equity in the mission statement or general guidelines. An additional five organizations are in the process of developing gender policy statements. These statements show a wide variation in terms of focus and depth. Statements range from recognizing the importance of integrating gender concerns or empowerment of women as vital for building social justice and democracy, to the goal of ensuring efficiency and effectiveness of programming. Two other organizations, which focus almost exclusively on women-specific programming, indicated having informal gender policies that are not explicitly written in their mission statement. The remaining fifteen agencies have either never discussed gender policies or have not been able to reach consensus on the formulation of any statement. However, several of these agencies indicated interest in advice and support.

Successful Approaches in Developing Gender Policy

Adventist Development and Relief Agency (ADRA) includes in its belief statement the principle that "the complete utilization of women's capabilities is a vital component of the development process, and of a successful society." In addition, "equal rights to health, education, self-realization and fulfillment of socio-economic potential" are explicitly mentioned as justification for a gender focus. As part of its operating principles, ADRA states that it "incorporates women into all levels of its operations and promotes an equitable role for women in the development process."

Childreach/PLAN International's gender statement calls on the organization to "encourage and actively support the advancement of women as decision makers, planners, participants, contributors and beneficiaries in the socio-economic, political and cultural process of development in all aspects of its programs."

Heifer Project International (HPI) states in its program guidelines adopted in 1993 that "gender issues and concerns about women should not be a separate concern or program area, but an integral part of all our work."

TechnoServe's gender policy specifies that all stages of the programming process—from program selection to implementation and evaluation—must include consideration of the role of and impact on women. It also calls for promoting greater awareness on the part of staff to consider these issues and stresses the need to attract more women into management and program positions.

⁴ Guidelines for Good Practice in Gender and Development, London: National Alliance of Women's Organizations, 1993, page 13

B. Participation of Staff and Local Partner Organizations in the Development of a Gender Policy

In order to ensure that policy is turned into practice, the development of policy statements needs to involve widespread participation of staff and partner organizations or field offices that are affected by the policy. By consulting with NGOs and partner organizations in the field, the policy will be more sensitive to the culture and experience of women and men in the Global South, enhancing both credibility and ownership of the policy by those it affects most.

Findings: All organizations which are in the process of drafting or which currently have a formal gender statement report extensive participation of senior staff from headquarters and the field in the development of their gender policy. In most organizations, gender working groups or women's commissions made up of both field and home office staff have been created to formulate guidelines and begin a strategic planning effort to address gender issues. However, only six out of eleven organizations with gender statements, or in the process of drafting one, report participation from local partner organizations in the development of a gender policy. Consultation with local partners in the process has occurred mostly on an ad-hoc basis, with regional representatives acting as contacts for local organizations.

Successful Approaches for Staff and Local Partner Participation

Childreach/PLAN International has set up an international working group to develop a strategy and plan of action for operationalizing the current policy statement.

ADRA has set up a committee made up of senior staff, field staff, board members, and private consultants to review its policies and undertake planning for gender integration.

Oxfam America has recently initiated a process to develop a formalized agency policy on gender and development. As part of this process, Oxfam America's Gender Working Group was established temporarily to facilitate the formulation of a gender policy. This group solicited recommendations and suggestions regarding gender policies through an elaborate survey involving all its partner and colleague organizations in the Global South that are concerned with gender issues.

SHARE, a small development organization that supports self-help projects in El Salvador, recently initiated a process to develop an official gender policy. The impetus for this undertaking came from women in their partner organizations in El Salvador, who expressed the need for SHARE to develop a funding and program policy around gender issues in order to foster women's leadership and encourage greater control by women over economic projects. In response, SHARE's Board of Directors created a women's advisory committee to develop the policy. The committee is made up almost entirely of women from SHARE's partner organizations in El Salvador and includes one SHARE Board member and one staff member.

II. Gender Integration in Programming

Integrating gender considerations fully into programming requires that gender roles and relations are taken into account in all stages of programming from project design and implementation to monitoring and evaluation. The ultimate goal of gender integration into programming is to ensure that programs give equal opportunities for women's and men's participation, leadership, access to benefits and control over decision-making. Specific tools such as gender analysis or needs assessment, participatory planning, and evaluation with men and women at different stages of programming are critical in order to design and implement programs which reduce gender-based discrimination.

Although it is generally accepted that there is the need for integrating gender concerns into programming, there is still an emphasis on women-specific projects among some agencies as the primary means to empower women. While women-specific projects are appropriate under certain conditions and can bring significant benefits to women, women-specific projects are often ineffective in achieving a long-term change in the balance of power between genders, since they often lead to further marginalization of women by reinforcing unequal gender based roles and responsibilities. By integrating women and gender concerns into all aspects of ongoing programs, agencies can more effectively sensitize men to the needs and interests of women and promote women's equality. However, it is important to note that support for women-only NGOs and institutions, as opposed to women-only projects, is a powerful strategy to promote women's empowerment since these agencies are often engaged in advocacy, coalition building, and leadership training.

A. Program Planning and Project Design

To assess integration of concerns for gender in program planning and project design, the survey looked at collection of gender disaggregated data, the use of a gender analysis or gender needs assessment, and consultation with local women's organizations in project planning and design phase. In general, the survey revealed that few member agencies have institutionalized integration of gender concerns into the planning phase of programming.

1. Collection of gender disaggregated data: Collecting gender disaggregated data about issues such as allocation of time, labor (productive, reproductive, family and community) and access to and control over resources is critical in order to design programs that promote equal participation and benefits for men and women.

Findings: 30% (9) of the organizations report consistent gathering and use of data disaggregated by sex, while an additional 25% (8) do so occasionally, particularly in cases where projects focus exclusively on women. Many agencies report collecting data for evaluation purposes rather than for use in program design.

2. Gender analysis and needs assessment: Gender analysis is used to assess the different roles, responsibilities, needs and interests of men and women and considers how these may be affected differently by project interventions. Gender analysis also examines the relations between men and women pertaining to access and control over resources and decision-making and their relative positions at the household and community levels. A thorough gender analysis and needs assessment can reveal constraints and limitations women and men face and enables project planners to design and implement projects that address and overcome inequities revealed in the analysis.

Findings: Only about 10% (3) of the survey sample incorporate gender analysis or needs assessment into their project planning and proposal writing phase by mandate. An addi-

tional 50% (13) of the surveyed agencies conduct gender needs assessment of projects on an occasional or informal basis. As with the collection of data disaggregated by sex, gender needs assessment is undertaken most often for womenspecific projects.

Successful Approaches to Gender Integration in Project Design

Heifer Project International (HPI) uses a gender analysis grid as a tool for implementing gender needs assessments in its programming. The gender analysis grid identifies the gender breakdown in terms of work roles/responsibilities, participation, and benefits. This system of assessment also attempts to show how a project may or may not contribute to a change in control over resources. Furthermore, in response to recent recommendations made by the organization's gender program officers, an effort will be made to monitor how women's confidence level and their status in relation to men are affected.

3. Consultation with local women NGOs in the project planning phase: Consultation with local women's organizations and involving women participants in program planning is perhaps the best way to ensure a gender perspective in program design.

Findings: 16% (5) of those surveyed report consulting with local women's NGOs in the project planning stages. An additional ten agencies report doing so when such groups are available and another 20% (7) consult with women's organizations when planning women-specific projects.

B. Implementation

The survey looked at whether organizations were tending towards gender integration in their programming or were continuing to focus on women-only projects as a means towards women's empowerment. Programs in the implementation phase are most likely to be gender sensitive when there has been adequate gender planning, when project workers have a gender perspective, and when gender issues are discussed among project participants.

Findings: 24% (7) of member agencies surveyed report that women-specific projects constitute 50% or more of their total programmatic activities. Three agencies report that women-specific projects constitute between 20-40% of their overall project portfolio. The majority of those surveyed (11) report fewer than 20% of their programmatic activities as being women-specific. Of the four agencies that report having no projects specifically for women, three indicate that participation and benefits in their general activities are distributed roughly equally between men and women. This hopeful development testifies to the efforts of these agencies to strike a balance between specific attention to women's needs and interests and gender integrated development planning in which women and men work together. Still, 33% of the organizations have no information available for this question, indicating a need for better gender disaggregated data collection and monitoring of gender impact.

Noteworthy in this respect is the response from one organization which has set up a separate women's empowerment campaign. The program officer involved in this initiative states that "women should be the focus of development programming. Women's participation plays a crucial role in development of objectives and for social change at the community level. But one needs men as well for community development. Women are key, often they are leaders, but it does not benefit to exclude men." Nevertheless, the campaign started by this agency constitutes a completely separate effort. While women's

empowerment is explicitly mentioned as the objective, this goal is difficult to find in the rest of the organization. A gender policy statement does not exist, nor is gender mentioned in the mission statement. Furthermore, data disaggregated by sex is collected and used only for this specific campaign, and, in general, little support for gender equality is found in the organization's non-women specific programs. Thus, a large gap seems to exist between efforts to increase women's participation in this program and attempts to integrate gender concerns into general programming.

C. Monitoring and Evaluation

Another key element of successful gender integration is measuring the project's gender impact, including its effect on relationships between men and women. While assessing gender impact can be difficult, there are a range of questions that can be asked. Some questions relate to changes in women and men's welfare and levels of participation, while others evaluate increases in women's awareness, leadership, and control relative to men. Gender impact also examines changes in women and men's roles in the family and community. These are all critical elements in measuring women's empowerment.

Findings: Agencies use a combination of qualitative and quantitative techniques in carrying out gender impact studies. Few agencies reported looking at 'Issues of control over resources, gender relations at the community or household level, increased confidence levels or changes in decision-making power. 40% of those surveyed evaluate some aspects of gender impact or women's involvement in projects. Not surprisingly, these are mostly the same organizations as those which have a gender policy statement. In cases where data was available, estimates of women's participation in integrated projects range from 25-60%, with an average of 40%. Survey results also show the existence of significant geographical differences in the extent to which women participate in development projects. For example, Latin American projects showed significantly less integration of women than African projects.

72% of the organizations which assess gender impact are mandated to do so by their donors rather than by internal guidelines. Striking is the example of one organization in which a gender policy statement, in the words of one senior staff member, is "not acceptable to upper management." In this case, the inclusion of gender impact exists not by internal policy, but because of donor requirements, which led the interviewee to speculate that 'USAID may be more effective than it thinks because NGOs do not always do it of their own will.' However, while this organization's evaluations may include a count of women's participation in projects and the number of women on staff and board, a senior staff member reports that this data collection is not necessarily used to inform program planning or policy. Other agencies also reported the positive impact which donor requirements can have in promoting gender equity and awareness.

Successful Approaches to Gender Impact Evaluation

Heifer Project International collects statistics disaggregated by sex for all its activities and measures changes- in patterns of ownership of resources and leadership among men and women..

Freedom from Hunger uses a monitoring system to assess the project's -impact which examines self-confidence building among women participants, their acquired management skills, and changes in women's positions within the household over a three year period.

III. Gender Focal Point or Committee

The responsibility for integrating gender concerns into organizational programming and policy must be clearly assigned in order to institutionalize the process throughout an organization. There is debate about which kind of structure is most effective: a centralized department or gender unit, or diffused focal points within different departments. Most of the literature and institutional experience indicate that it is important and necessary to have both. A gender officer or gender unit, preferably under the authority of the CEO, takes on responsibility for monitoring gender practices, providing gender training and giving programmatic support for the organization as a whole. A focal point for gender concerns is often an already existing staff person located at the management level in each department who receives special training to ensure integration of gender concerns into all aspects of the department's programming. In the same way that organizations can institute women-specific programs without necessarily changing the essence of the majority of their programs, so organizations can add a gender or women's unit without institutionalizing the responsibilities for gender integration throughout the organization. Therefore, by including both a separate gender officer or unit as well as a specialized gender person in each department, organizations will be more successful in mainstreaming gender equity concerns.

Findings: Almost 40% (11) of the surveyed organizations report having a staff position or unit focusing on women or gender: six organizations have a full-time special unit that focuses specifically on issues of gender and development, and five have positions which have a gender component, specified clearly in job descriptions. The levels of decision-making power and funding for these units and positions are reported to be high, with support from senior management usually being extensive. Several organizations indicate having informal or temporary committees or staff that are considering gender issues, but without the formal responsibility to do so.

Successful Approaches to Mainstreaming Gender

ADRA has initiated a women in development task force made up of staff members, field employees, and private participants to ensure that the various departments focus sufficiently on women. The task force is formulating guidelines on gender needs assessment and gender impact evaluation,,

Save the Children maintains a Women and Child Impact Program which has contributed to increased gender integration within different aspects of the organization's programming. One objective of the program is to articulate, and clarify the organization's program principles in relation to gender integration and to train staff members in the application of these principles.

Childreach/PLAN International established a Women in Development workgroup in 1989 to develop an organizational strategy and policy guidelines for the advancement of women. Overall organizational restructuring slowed down progress on the final adoption of a plan. In 1994, a workgroup was reconvened with a meeting of staff from four regions to create a new plan called Gender Awareness for PLAN (GAP). The new GAP workgroup sees itself both as a separate unit with its own activities and as an advocate for ensuring that gender equity is built into all of PLAN's programs.

World Vision has recently added the coordination of gender and development activities to job descriptions of regional program directors in Africa, Latin America and Asia. The Gender and Development (GAD) Coordinators prepare workshops on raising awareness of gender issues and make general assessments of what should be done to promote gender integration throughout the organization. In addition, many field offices also have staff who are responsible for integrating gender into country programs.

Oxfam America has consciously chosen, not to have a gender unit because of the potential for marginalizing the issue. The organization believes that each program officer must take responsibility for ensuring that gender concerns are applied across the board to all their programs. Oxfam plans to make gender training a priority for its next annual meeting of global programs staff.

IV. Gender Integration Training

In order to implement gender sensitive programming, agencies must provide staff with the necessary gender training and tools required to operationalize gender equity in their programs. Training is most effective when it is followed up with stated procedures for implementation as well as a demonstrated commitment from management in different departments of the organization.⁵

Findings: Roughly one third (9) of the members surveyed offer some form of gender training for the home-office or for field staff. A few of these agencies indicate that training consists of informal workshops with speakers and introductory sessions to generate discussion and encourage involvement in gender issues. In other agencies, gender awareness is included as part of general training sessions. In most cases, attendance is not mandatory, and the frequency of such training and workshops ranges from once a year to once every four to six months. In many cases, the gender training that has been offered does not appear to provide staff with sufficient tools and methodologies needed for fully integrating gender into programming and evaluation, nor has training focused on strategies for institutionalizing the integration of gender concerns throughout an organization.

V. Support For Gender Integration From Senior Management

The literature as well as member agency experiences affirm that in order for principles of gender equity to be fully integrated into an organization's programs and policies, there must be support and leadership from senior management, particularly the CEO.

Findings: Support for gender integration efforts is widespread among the surveyed agencies: a large majority of surveyed organizations (26) report positively on support from their CEO, while more than one half (17) indicate support from their Board of Directors. Not surprisingly, many organizations surveyed note that their high percentages of female employees is evidence of absence of barriers to women serving in senior management and of support for gender equity from both the Board and the upper-level management.

⁵ Mandy Macdonald (ed), *Gender Planning in Development Agencies: Meeting the Challenge*, UK: Oxfam, 1994, page 156

VI. Gender Equity In Internal Management Policies

A. Representation of Women in Senior and Field Management Positions

Organizations which are working towards the promotion of gender equity in their programming are much more likely to reach their goals by increasing women's access to status, power and decision-making within their own organizations. While it is possible for men to demonstrate and incorporate gender sensitivity in their decision-making processes, it is far more likely that women will raise issues that are of particular concern to women. Particularly at the field level, women in leadership positions will be more likely to address gender issues by talking to grassroots women, working with women's organizations and promoting policy work with a gender perspective. Women in field management positions are also more likely to discuss gender issues with partner organizations and to participate in gender networks with other development professionals. Both in the field and at headquarters, an organization's gender work can be greatly strengthened by actively recruiting and hiring women with a gender perspective into senior management positions.

Findings

Women In Senior Management In Headquarters. 10% (3) of the agencies, two of which have gender policy statements, have fewer than 10% women in senior level positions. In three other agencies with gender policy statements, women represent between 10% and 30% of senior management. Half of the agencies surveyed report that women constitute between 30% and 50% of their senior management at headquarters; and 33% of the agencies surveyed (10) report having more than 50% women in senior management, 14% (4) have women in more than 70% of senior management positions.

Women Managers as Field Managers. In 70% (12) of the organizations with field staff, women constitute fewer than 50% of all field directors and/or area representatives. Of these, six organizations have fewer than 30% women in management positions.

Barriers to Advancement

Rather than identify successes, many of the organizations surveyed (30%) talked about significant structural barriers which make it difficult for women to become and remain successful managers. Not surprisingly, agencies with the highest percentage of women in senior management reported minimal barriers for women advancing to these positions. The organizations surveyed identified the following factors as limiting women's advancement into senior management positions:

- ☒ **Lack of commitment from top management** to hiring women for senior positions is a barrier. A senior program officer from one large member agency reported that "gender integration will not happen until there are women in management." There is a need for an increased number of women in positions which involve decision-making over allocation of resources.
- ☒ **Biases in the hiring process** were mentioned by one agency. For example, stringent qualification requirements served to exclude women: one of the organization's requirements was that candidates should have ten years of field management experience. This criterion overlooked the fact that, ten years ago, there were few women in field management positions, and consequently resulted in excluding women from the pool of candidates. It reinforced the notion among senior management officials that certain jobs were less appropriate for women.
- ☒ **Lack of pay equity and equal opportunity for advancement** were identified by a few organizations as barriers. Women in similar positions to men received lower salaries and faced limited opportunities for advancement compared to their male counterparts. Another organization reported that women were not in senior management positions because of lack of a good pool of candidates," which may be a result of lack of adequate outreach to women.
- ☒ **Church based traditions:** In two cases, affiliation with churches was mentioned as a source of resistance to advancing women and addressing gender equality issues. Emphasis on raising awareness within the church hierarchy is seen as an important step towards positive action.
- ☒ **Different management styles** of men and women are not taken into account or valued equally. "Women are more process-oriented and operate differently from men" remarked one interviewee and are therefore not rewarded with advancement to senior management.
- ☒ **Cultural Issues:** Several organizations identified cultural issues as an impediment to women's opportunities in field management positions.

B. Gender and Recruitment

There are many strategies agencies can employ for recruiting, retaining and advancing women in senior management positions. These are addressed in the remaining sections concerning staff recruitment strategies and family friendly policies.

1. Equal Opportunity Policy

All agencies are required by federal law to have an equal opportunity policy. These policies, which are often supported by active affirmative action programs, help to remove barriers and discriminatory practices against racial and ethnic minorities and women. In this part of the survey, we looked at how equal opportunity policies specifically promote

women's equal opportunity within an organization. Ensuring equal opportunities in practice involves a range of management practices, including gender sensitivity in recruitment, employment conditions (family-friendly work policies), and opportunities for promotion and career development.

Findings: All agencies surveyed report having equal opportunity policies. 33% of the agencies surveyed (11) provide staff training on how to promote equal opportunity recruitment and selection. Such training, however, seems to be limited in many cases to issues of diversity without specific attention to gender concerns. The most common recruitment measure to assure a large pool of women candidates (used by 23% of those surveyed) is to list job openings in places which are likely to reach women, such as women's newsletters and women's organizations. Almost half of the remaining 23 organizations report that they do not use these channels since women already constitute a majority in their ranks. Five organizations report encouraging women within their organization to apply for senior level posts.

Many organizations have policies which specifically outline the need for proactive hiring strategies to recruit women and minorities into senior level positions. However, they did not report taking active measures to enforce their policies.

Successful Approaches for Proactive Advancement of Women

Save the Children worked with a personnel recruitment agency specializing in diversity to identify a wider pool of talented executive women for their senior management positions.

Oxfam America identifies and recruits women into senior management positions by advertising with women's groups and colleges. It also has policies of providing encouragement for training sessions and skills assessment for women within the organization to advance to senior positions.

American Friends Service Committee's Nationwide Women's Program identifies and targets women for senior management positions. Women in mid-level positions within AFSC are encouraged to apply for senior level positions.

Academy for Educational Development recruits through community programs and newsletters that are likely to reach more women.

2. Gender Awareness in Hiring and Job Performance Evaluation

In order to promote integration of gender concerns into programming and policy, hiring and job evaluation practices must take into account employees' commitment to and understanding of gender equity issues. By including gender issues in interviews, job descriptions and performance reviews, organizations will attract and retain employees who are more likely to pursue gender sensitive practices.

Findings

Job descriptions. American Friends Service Committee is the only organization which reported including sensitivity to gender issues in its Job descriptions for managers. One other agency indicates that it is planning to include gender sensitivity in job descriptions in the future. Several agencies report that while attention to gender is not explicitly written into job descriptions, employees are expected to demonstrate awareness of gender issues.

Job Interviews and Selection Process. 20% (6) agencies report that demonstrated gender awareness is an important criterion in the selection process. These same agencies include questions about gender sensitivity in the interview process. For example, World Neighbors may ask a question in the interview process such as "How can an organization like World Neighbors best address the problem of gender bias and women's participation?" World Neighbors also states that gender awareness is an explicitly written criterion in the selection process. Several other agencies, including Oxfam, indicate that gender issues are not always raised explicitly in the interview process. However, several of these agencies indicate that candidates who do not raise gender issues on their own in responses to certain questions will be evaluated negatively on that point in the job hiring process. Of all the agencies surveyed, AFSC notes giving the most weight in the interview and selection process to responses that indicate gender awareness. AFSC's job interview recruitment and selection processes for all professional and managerial level positions include the participation of a member of AFSC's women's program.

Personnel Evaluation And Promotion Processes. 25% (5) of the organizations surveyed include gender awareness as a criterion in their personnel evaluation and promotion schemes.

C. Family-Friendly Employment Policies

Family-friendly work policies enable workers---both men and women---to balance their work and family responsibilities more easily. These policies include flextime, flexiplace, parental leave policies, and part-time and job sharing working arrangements. Since women are often the primary caregivers in families, providing family-friendly work options often has a greater impact on women, enabling them to take on more senior level positions in an organization without negatively affecting their ability to care for their families. Encouraging men to take advantage of these policies and work arrangements promotes more equitable sharing of family responsibilities and enables men to overcome social stigmas regarding gender roles in the family. In order for family-friendly policies to really make a difference at the senior levels, organizational culture and senior leaders (CEOs) must clearly support employees' choice to take advantage of these policies and practices.

1. Maternity and Paternity Leave Policy

Findings: As stipulated under the Family Medical Leave Act, all the agencies surveyed have a policy under which women can take three months of job-protected leave in the case of pregnancy. Usually, a combination of paid and unpaid leave is offered, with paid leave typically including accrued sick leave and/or vacation leave. Inter Action member organizations surveyed permit an average of four months leave. A limited number of organizations, however, have only unpaid leave available. Beyond paid leave, some agencies also provide to primary caregivers a leave of absence with partial or no pay. Generally, the most flexible arrangements are offered by those organizations which either have a gender policy document or are working informally to integrate gender issues into their overall structure. Only 27% of the surveyed organizations (8) offer paid paternity leave ranging from three days to two weeks. Many others allow the secondary caregiver to take accrued personal and sick leave or other leave, but in a few cases, a paternity leave policy does not yet exist.

Successful Approaches to Parental Leave

Oxfam America permits primary caregivers (men or women) to take three months paid leave and an unpaid fourth month, during which accumulated paid leave or short-term disability insurance can be used in appropriate cases.

Unitarian Universalist Service Committee offers eight weeks of paid leave in addition to four weeks of unpaid leave, during which time sick pay and vacation pay may also be used. In addition, UUSC offers two weeks paid and six weeks unpaid paternity leave.

Helper Project International offers three months of unpaid leave and any additional accrued vacation and sick leave to the primary caregiver,

World Neighbors offers to the- primary caregiver (man or woman) four weeks of paid leave in addition to 8 weeks of accrued vacation/sick leave and unpaid leave. Moreover, the secondary care giver is given two weeks of paid leave in addition to 10 weeks accrued vacation and sick leave.

2. Child and Dependent Care

Findings: More than half the organizations in the survey (60%) do not have any provisions or benefits for child or dependent care. 30% of the surveyed organizations offer flexible spending accounts, which enable employees to use automatically deducted untaxed income from their paychecks for childcare. In three of the surveyed member organizations, flexible spending accounts are supplemented by benefits such as child allowances, pay for work during irregular hours, and subsidized on-site child care. All organizations offer their employees the possibility to use sick leave, discretionary/ personal leave, or vacation leave for dependent care, while additional unpaid leave is granted by several agencies. Several of the larger agencies are looking into the possibility of providing on-site childcare.

Successful Approaches to Childcare

SHARE provides \$250 per month allowance for the first child, and \$200 for each additional child up to \$650 per month for childcare.

Oxfam America allows up to \$5,000 to be deducted (pre-taxed) from pay checks for dependent and child care and offers \$6 per hour in childcare coverage for employees working outside regular hours.

American Friends Service Committee offers on-site subsidized childcare

3. Flexible Working Arrangements

Findings: With the exception of two, all the organizations surveyed provide employees with opportunities for flexible working arrangements. At least on paper, flexible work hours are commonplace, usually depending only on the nature of the job and permission from supervisors. Still, estimates of those who take advantage of these arrangements vary from virtually everybody at one agency to almost no one at another. The most common form of flexible work arrangements is flextime, allowing employees to choose

the times of their daily work schedules. In addition, some offer flexibility in the length of the work week. Telecommuting (working at home), job-sharing, and part-time work are reported by a small minority of the surveyed members. It appears that the larger organizations are able to offer the most flexibility to their employees. In five organizations, employees take advantage of the option of telecommuting or working at home. Three organizations indicate opportunities for job sharing and an additional five indicate part-time work opportunities.

a. Employee Encouragement. 60% (18) of the agencies reportedly encourage employees to use flexible working arrangements. They are made aware of these policies through employee handbooks or departmental meetings. However, a few (10%) agencies do not actively promote the options mentioned above, although they do not deny any requests. In six cases (20%), there is no encouragement at all.

b. Flexibility for Senior Managers. In the case of senior management positions, part-time work or job-sharing are available in 27% (8) of the agencies surveyed. However, in nine additional agencies (30%) the question of flexible working arrangements for senior staff members has never arisen. On the other hand, twelve agencies (40%) report that these options are not viable at the senior level in their organizational structure. It is interesting to note that of these twelve organizations, ten have substantially fewer than 50% women in senior management and only two have greater than 50% women in senior management.

Successful Approaches to Flexible Work Arrangements

American Friends Service Committee offers the option of a 4 day work week within the standard 35 hour work schedule. Employees can take advantage of this option with prior approval from the supervisor. Options also include other flexible scheduling.

CARE USA reports a wide range of flexible work arrangements including telecommuting, flexible work weeks (e.g., 4 day work weeks) and job sharing.

Winrock International is in the process of expanding and formalizing its flexible work policies to include part-time work with benefits, and opportunities to work at home.

Partners of the Americas offers a number of flexible work arrangements including flextime, telecommuting, and part-time work.

Action International offers part-time work opportunities. Five female staff take advantage of this.

Handout of exercise G: organisational audit

(Kolb et al. 1995 pp 346-347)

The following organisational culture elements can be used to assess an organisation. They are 'gender-neutral' in wording, but what about reality?

- 1. Conformity:** the degree to which staff members feel that there are many rules, procedures, policies, and practices to which they have to conform rather than being able to do their work as they see fit.

Conformity is not characteristic of this organisation

1	2	3	4	5	6	7	8	9	10
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Conformity is very characteristic of this organisation

- Do you think that all levels of staff make the same assessment? And what about male and female staff at the different levels? Why or why not?
- Do you think that the rules, etc apply to male and female staff in the same way?
- What will happen if a male staff member and a female staff member do not follow the rules?
- What could be the underlying values and beliefs of this element? Do they favour men and women equally?

- 2. Responsibility.** The degree to which staff members feel that they can make decisions and solve problems without checking with superiors each step of the way.

No responsibility is given in the organisation

1	2	3	4	5	6	7	8	9	10
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There is a great emphasis on personal responsibility in the organisation

- Do you think that all levels of staff will make the same assessment? And what about male and female staff at the different levels? Why or why not?
- Do you think that this responsibility is given to male and female staff equally?
- What will happen to a male staff member and a female staff member in case of deviation?
- What could be the underlying values and beliefs of this element? Do they favour men and women equally?

- 3. Standards.** The emphasis the organisation places on quality performance and outstanding production and the degree to which staff members feel that they are challenged to adhere to these standards.

Standards are very low or non-existent in the organisation

1	2	3	4	5	6	7	8	9	10
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High challenging standards are set in the organisation

- Do you think that all levels of staff will make the same assessment? And what about male and female staff at the different levels? Why or why not?
- Do you think that the standards apply to male and female staff in the same way?
- What will happen if a male staff member and a female staff member do not fulfil the standards?
- What could be the underlying values and beliefs of this element? Do they favour men and women equally?

4. Rewards. The degree to which members feel that they are being recognised and rewarded for good work rather than being ignored, criticised, or punished when something goes wrong.

Staff members are ignored, punished, or criticised.

1	2	3	4	5	6	7	8	9	10
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Members are recognised and rewarded positively.

- Do you think that all levels of staff will make the same assessment? And what about male and female staff at the different levels? Why or why not?
- Do you think that the rewards or criticism apply to male and female staff in the same way?
- Do you think that the assessment of 'good work' or 'wrong work' depends on the sex of the staff member?
- What could be the underlying values and beliefs of this element? Do they favour men and women equally?

5. Warmth and support. The feeling that friendliness is a valued norm in the organisation, that members trust one another and offer support to one another. The feeling that good relationships prevail in the work environment.

There is no warmth and support in the organisation.

1	2	3	4	5	6	7	8	9	10
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Warmth and support are very characteristic of the organisation.

- Do you think that all levels of staff will make the same assessment? And what about male and female staff at the different levels? Why or why not?
- Do you think that 'friendliness, trust, good relationships' includes both men and women, men only, women only, certain levels of staff only, certain class, caste or ethnic groups?
- What could be the underlying values and beliefs of this element? Do they favour men and women equally?

6. Leadership. The willingness of staff members to accept leadership and direction from qualified others. As needs for leadership arise, members feel free to take leadership roles and are rewarded for successful leadership. Leadership is based on expertise. The organisation is not dominated by, or dependent on, one or two individuals.

Leadership is not rewarded; staff members are dominated or dependent and resist leadership attempts.

1	2	3	4	5	6	7	8	9	10
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Staff members accept and reward leadership based on expertise.

- Do you think that all levels of staff will make the same assessment? And what about male and female staff at the different levels? Why or why not?
- Do you think that staff members will accept leadership of any staff member irrespective sex?
- Do you think that male staff members can take leadership roles as easily as female staff members?
- What could be the underlying values and beliefs of this element? Do they favour men and women equally?

Handout of exercise H: What makes an organisation woman-friendly? (Macdonald et al.1997 pp 91)

The woman-friendliness of an organisation is highly contextual and culturally specific. However, the following elements could be considered as a general guide.

- Materials displayed in the building, e.g., pictures, posters, and other graphic material, announcements of meetings and activities, are not disrespectful of women.
- Appropriate facilities, such as lavatories, child care, transport are provided.
- There are procedures to deal with sexual harassment.
- Men and women do not make nasty jokes or comments about the other sex.
- Diversity of styles between men and women is viewed as a strength of the organisation.
- Provision of working arrangements which enable the combination of work with reproductive/caring responsibilities outside the workplace, such as part-time employment, flexible working hours and leave arrangements, etc.

Section 2: How to Find Out about Gender in an Organisation? – Organisational Gender Analysis

Gender is inherent to each organisation: gender roles and relationships are characteristic of each organisation. We have seen that some roles and relationship are easy to observe, while the processes and underlying beliefs and values which determine them are mostly hidden. A gender analysis reveals the structures, processes, and cultures of an organisation from a gender perspective. It provides insights into why the situation is the way it is and why it has developed that way. The analysis helps us to identify gender gaps. Furthermore, it gives indications about change and possibilities for change within the organisation in terms of gender.

Our dictionary

An **organisational gender analysis** is a systematic effort to understand the roles and relations of men and women in an organisation. It indicates the capacity and willingness to address gender issues internally and related to its programmes and other products. The analysis concerns the organisation itself and the context in which it is operating.

A tool for analysis

The organisational 'Nine-Boxes' framework is a useful instrument to conduct an organisational gender analysis. One by one the boxes or elements are considered from a gender perspective in order to describe and understand the situation in terms of gender. Assessing the situation concerning gender roles, relations, and opportunities should be done in the light of the general organisational picture. The absence of a gender policy in an organisation without well-developed or well-used policies has less significance from one in which policies are key references for actions. Interestingly, gender analysis often gives us more insight in the situation and functioning of an organisation in general. For instance, asking about gender in personnel matters may reveal that policies and procedures are not well-developed or are outdated; asking about cooperation may demonstrate that certain staff members assist each other informally although formal mechanisms to promote cooperation

have never been developed. This type of information is of importance, for it opens possibilities for gender-related change in realistic ways.

In Box 2 a checklist of key items is presented to guide an organisational gender analysis. Below we briefly comment on the assessment of the different organisational dimensions and elements.

As we remarked above elements of the technical dimension are the most visible. Policy papers, work plans, budgets, annual reports, monitoring and evaluation systems, organograms, task descriptions, administrative rules, information systems, recruitment procedures, job descriptions, workplace conditions, lists of staff participating in training, appraisal systems, a map of the office, and so on reflect how the organisation has arranged its technical, financial, and human resources. Thus, document analysis can be used to assess to what extent gender is embedded in policies and actions, tasks and responsibilities, and expertise. Documents, however, only partly answer this question: it does not tell if and how papers, reports, systems, procedures, and facilities are used. They tell us about the availability but not about its utilisation. Policy papers can be hidden in drawers, gender policies can be token documents, a gender unit may function marginally, advertisements of vacancies may include the phrase 'women are encouraged to apply' when actually few women are ever hired, etc. Therefore, there is a need to explore further what happens in reality through interviews, questionnaires, or observation. Critical questions are 'why is it there/done?', 'what is done with it?', 'how is it used?' and 'who have been and who are involved?'. Asking for examples to illustrate points can be very revealing. Answers to the question 'how long ago has it been introduced and what happened next?' will help to get a more historical insight. And just ask for a copy – it will be interesting to learn where information is kept, by whom, etc.

Processes taking place in the field of policy influence, in decision-making, and related to providing/creating room to innovate or manoeuvre are not easily visible. Information regarding this socio-political dimension requires more subtle methods. Interview questions suggested above about why, what, who, where, when, how long, and how much are relevant in this respect. Observations in meetings, 'who talks to whom' in the corridor or at lunch, 'who meets whom' after work, etc. provides valuable information. Written material can also give some insight into how male and female staff participate and what opportunities are available to them — such as minutes of meetings or paragraphs in annual reports. These materials can be instrumental in obtaining the opinions of staff on what happened and why things happen as they do. Personal examples offer a key to understanding organisational processes of decision-making and conflict resolution, and the roles staff members play. These personal illustrations are of special relevance in order to understand the organisational room for manoeuvre/innovation. It should be stressed that views of staff members on processes and power plays probably differ widely depending on their position, responsibilities, information they have access to, age, ethnicity, and, of course, their sex. It is this variety of views that is most interesting in an organisational analysis from a gender perspective since it provides the basis for discussion on gender-related organisational change.

Even more complicated is the analysis of the cultural dimension, which concerns the hidden elements of an organisation: the values, standards, beliefs, assumptions about roles, relationships and opportunities of men and women. Individual interviews and observations of symbols, rituals, and processes are useful methods. Questions about opinions on critical events, a promotion, conflict resolution, cooperation, learning, sym-

bols, the way somebody feels him/herself valued and so on could indirectly give information about individual standards and values. Furthermore, organisational audits such as the questionnaire used in exercise G can be used, as well as other exercises in the previous sections depending on the organisational context. It should be noted that it will take time to really understand one's own organisational culture from a gender perspective.

A careful and well-planned exercise

It is evident from the above, that conducting an organisational analysis is not an easy task. Firstly, staff members are often not aware of processes and cultural elements which shape the organisation. The exercise requires probing and cross-checking responses. Secondly, perceptions about roles and relations of male and female staff members and gender in general usually vary among staff members. Therefore, a diverse group of male and female staff with different positions, tasks, responsibilities, and background (class/caste, ethnicity, age) should be involved to get a representative picture. Thirdly, gender is very often a sensitive issue that staff members do not like to talk about. Organisational issues are often just as sensitive, as staff are reluctant to talk frankly about problems within their organisations publicly. Therefore, one has to carefully consider what method to apply to make staff feel at ease. Time, place, and setting are important. Our suggestions include personal interviews during lunch or a group discussion, questionnaires, and observation. The analysis can be done by one staff member or a small group of colleagues or even an outsider. Much depends on the organisational culture, the context in which the analysis takes place, the reason to do the analysis and the support of management towards the analysis.

Box 2: Checklist of key items for an organisational gender analysis

Policies and Actions

- Is gender integrated in policies of the organisation? In which ones?
- Does a gender policy exist with regard to its 'products' (programmes, projects, training, etc) – an 'external' policy - and/or to the organisation – an 'internal' policy?
- If so, to whom does the policy refer (men/women; professionals/support/field staff, etc?) What issues does it address: conditions and/or positions?
- Is the policy on gender operationalised and not just a piece of paper in a drawer?
- Are activities to address gender issues at organisational and/or at programme level part of the action plans of the organisation? Are they implemented?
- Is there sufficient budget available and used to implement these activities?
- Are indicators used to measure the outcome and impacts of the activities related to gender?
- Are data of M&E systems differentiated according to gender? What is done with the M&E information on gender?

Tasks and Responsibilities

- How many men and women are employed at what levels (in each department, division, unit, etc) and in what positions?
- Are there any differences between tasks and responsibilities assigned to men and women? If so, where and in what way?
- Do special procedures and rules exist for men and women? What are the implications?
- Do male and female staff both have access to the same information?
- At what levels, units, and in what positions are gender issues dealt with?
- In which tasks and responsibilities is concern for gender within the organisation and within the programmes included? Do staff work according to these tasks and responsibilities?
- Does everyone in the organisation know about the tasks and responsibilities of staff concerned with gender issues?
- Are information flows about gender issues within the organisation and its programmes existing and operating?
- Are activities related to gender in various sectors or departments well-coordinated?
- Are procedures and rules supportive to addressing gender issues?

Expertise

- Are male and female staff adequately trained to address gender issues?
- Are sufficient male and female staff available who can deal with gender issues?
- Do job descriptions include reference to gender?
- Are the sexes equally represented at all levels and/or are measures taken to balance it or to overcome constraints?
- Are new staff members carefully selected in terms of gender sensitivity and capacity?
- Does there exist an adequate infrastructure to enable both male and female staff to carry out work (safe working environment, transport arrangements, location of office, toilets, etc?) Is there a complaint officer sensitive to or especially concerned with gender issues?

- Are new staff members sufficiently introduced to the way the organisation deals with gender issues?
- Is gender a topic which is discussed during performance appraisal interviews?
- Are staff members regularly trained to keep expertise up to standard in the field of gender?
- Are all training facilities accessible to both men and women? Are these opportunities used by both of them?

Policy Influence

- Are bodies or people who have a say in the running of the organisation (such as the board of directors, management, informal opinion leaders) aware of and supportive to address gender issues?
- Does the management consult others within and outside the organisation with regard to gender (e.g. staff, researchers, gender specialists, women's networks)?
- Are the opinions/requirements of external stakeholders taken seriously by the management (e.g. men and women of the target group, pressure groups, donors, business community, etc).

Decision Making

- Which men and women of what positions belong to decision-making bodies? What roles do the men and women play in the decision-making?
- Which male and female staff are involved in which decision-making processes?
- Are the situation and interests of men and women taken into account in decision-making - at what level and of what nature (e.g. working conditions, programmes, etc)?
- Are decisions related to gender issues - timely - taken into action?
- Are conflicts related to gender in the work and in the organisation dealt with adequately without a male or female bias?
- Are control mechanisms existing in the organisation (financial, reporting, quality control, etc) equally applied towards women or men?

Room for Manoeuvre/Innovation

- Does the right space exist for both men and women to work to their satisfaction? Is there any difference in the degree men and women have to ask permission to undertake certain actions or to deviate from their job description?
- Are interesting career opportunities offered irrespective of sex or field of expertise?
- Are good performances of both men and women staff recognised and rewarded, more particularly in the field of gender?
- Does the right space exist to work towards gender equity? Is there room for discussion and actions?
- Does working in the field of gender have status?
- Are staff who take initiatives for gender equity rewarded or praised?

Organisational Culture

- Does the consideration of gender roles and relations and addressing gender issues fit the image of the organisation?
- What is the reputation of the organisation according to outsiders - is it considered to be gender sensitive or gender-friendly?
- Are both 'feminine' and 'masculine' values reflected in the symbols of the organisation?

- Is there an openness and appreciation to deal with gender issues?
- Is high quality work considered to include attention to gender equity?
- Does the staff share values and norms with regard to gender equity within the organisation and in its programmes? For instance: is it a shared value that both men and women can perform work according to the same standard? Is it a shared value that both men and women have equal opportunities within the organisation? Is it a shared value that male and female staff should be able to pay attention to social and family obligations (illness, etc), besides commitment to good performance in the working place?
- Does the organisation demonstrate gender-friendly behaviour in terms of language used, jokes, comments, procedures on sexual harassment, styles of meetings, etc.

Cooperation/Learning

- Do male and female staff support each other in the work and in solving problems?
- Is attention paid to team building involving men and women and is it valued?
- Is work related to gender performed in teams and/or are people responsible to addressing gender issues supported by others?
- Is there a willingness to learn and cope with institutional changes, especially in the field of gender?
- Are new ideas in the field of gender communicated and integrated in the different disciplines/divisions, etc?
- Is there a willingness to cooperate with institutions/individuals outside the organisation on gender issues?

Attitude

- Do individual staff members demonstrate commitment towards gender equity in the organisation and in its programmes?
- Do individual staff members accept responsibility to address gender issues in the organisation and in its programmes?
- Are individual staff members motivated, show readiness, adapt easily to changes related to gender?
- Do individual staff members show a positive attitude towards colleagues expressing concern about gaps in the position and conditions of women relative to men (without stereotyping)?
- Do staff demonstrate gender sensitive behaviour outside of the office towards women in general?

EXERCISES: ORGANISATIONAL GENDER ANALYSIS

I. Organisational gender analysis – a quick personal scan

Note: this exercise often needs intensive support by the facilitator(s).

Aim of the exercise: to get a better insight in the gender roles and relations in the participant's own organisation and the processes and cultural elements which give shape to them.

Time: 2 hours

Method: individual exercise, discussion

Materials: pen, paper, whiteboard, hand out Nine-Boxes framework (Table 1). Hand-out checklist of key items for an organisational gender analysis (Box 2).

Steps:

1. Explain organisational gender analysis and factors influencing the effort (see Section 2 this part of the manual).
2. Ask each participant to make an analysis or 'quick scan' based on his/her personal view as follows:
 - a. Find out what the organisation's situation is in terms of gender by looking at each box of the Nine Boxes framework.
 - b. Find out why the situation is like that considering each box.
3. Form small groups of 2 or 3 people and ask them:
 - a. to discuss the two questions as answered by each participant,
 - b. to make three main observations about similarities between the organisations, and
 - c. to make three main observations about differences between the organisation.Let them write the answers on a flipchart.
4. Discuss the group outcomes in the plenary. Discuss also the difficulties encountered in the scanning effort.

J. Selecting people for involvement in an organisational gender analysis

Aim of the exercise: 1) To enable better reflection on the method of organisational gender analysis. 2) To prepare for a gender analysis in the participant's own organisation.

Time: 30 minutes

Method: Venn diagram, discussion

Materials: flipcharts, markers, wall

Steps:

1. Explain the aims of the exercise. Ask if participants know the method of Venn diagramming, if not explain. Show how to make a diagram related to the exercise. The circle in the centre represents the participant. The people who mostly influence her or him are represented by circles of different size: smaller for those who have less

influence, larger for those with bigger influence. These circles are placed at a certain distance from the central circle (her/himself) indicating the closeness of the relationship with these persons. Lines can be drawn connecting these circles to the central circle showing the direction of influence (one or two-way).

2. Ask the participants:

- to list people who influence their work and working environment within their organisation,
- to draw a Venn diagram on a flip chart,
- to select from the diagram drawn those persons to be included in the gender analysis and to explain the reasons why they select them, and
- to indicate the method for collection of information for each (group of) people selected.

3. Let them put the charts on the wall and discuss the drawings of a few participants and the methods chosen by them.

K. Organisational gender analysis within the own organisation

Aim of the exercise: 1. To describe the situation in terms of gender within the own organisation. 2. To identify gender issues in the different dimensions (technical, socio-political and cultural) in the organisation and the reasons behind these issues.

Evidently the exercise itself should be done in the own organisation to get a representative picture of the organisation's situation. In the training, attention can be paid to the preparation. Discuss with the participants the methodology and planning of the exercise. Pay attention to the people and factors likely to support and constrain them during the research and how they can deal with these favouring and hindering actors and factors.

An important issue to consider is to what extent and how they want to involve colleagues and/or outsiders in the analysis. Pay ample attention to the way they want to introduce the research and the importance to get support from management. Role plays can be useful instruments to exercise and to stimulate discussion.

If it is possible to meet the participants after they have done the analysis to discuss the outcomes as well as the process of information collection. Interesting questions for debriefing are the following.

- What method helped you to get the best results - what do you mean by 'best'? Why do you feel so?
- If you conducted the research with colleagues: how did you motivate them, what was their attitude, did any attitudinal changes take place during their involvement or after the research?
- Did you notice any effects on staff who you interviewed (or whatever method you applied)? In what way? How did you motivate them to cooperate? How did they react on your research? Did you have to specially consider certain people (like superiors) during the preparation and implementation of the research? What was the effect of your research?
- Let participants discuss important learning experiences in small groups. Ask the group members to select one of their learning experiences concerning the way they conducted the research to show in a role play. For example: something that they realised to be a wrong approach or an excellent approach towards convincing their superior or staff to cooperate in the interview; some wrong questions used; the right choice of interviewees; etc.

Section 3: Organisational Change and Gender

Organisations are not static entities although people may not be aware of their internal dynamics. Change is a natural state of an organisation in order to remain relevant and effective. Internal factors can be the driving forces of change such as a different working approach of a new employee or an increase in the numbers of staff. Organisations can also be stirred by external factors such as a significant technology, a change in government policy, competition, and so on. For organisations do not stand on their own: they have relations with the external environment.

Changes can be gradual and radical, superficial and fundamental, temporary and permanent, occasional and continual. Referring to the Nine Boxes framework, changes can take place in all boxes or organisational elements. A certain change usually has a chain reaction: starting with one element other elements will be affected as well. For instance, the introduction of a gender policy stating that both men and women's needs should be addressed (element: policies and action) can affect decision-making concerning development programmes: only programmes where needs' assessment takes place will be discussed (element: decision-making). Next, it may appear that more male staff are required to discuss with male farmers about their specific needs in relation to women (element: expertise). In one way or another all these changes affect gender roles and/or gender relations in regard to the organisation and its products.

Besides natural change, change can be planned as well, i.e., certain activities are being undertaken to bring changes within the organisation which are assumed to improve its operation. Change can relate to the technical dimension, for example, recruiting more female staff from a minority group (element: expertise). It can be in the socio-political dimension, for instance, to create more career opportunities for men in a women-dominated organisation (element: room for manoeuvre/innovation). And change at the cultural dimension can be aimed for, for example, promoting the importance of the teamwork of female and male staff (element: cooperation/learning).

Planned change often requires specific attention to motivate staff members, especially when its realisation requires a change in beliefs, values, or attitudes. Changing people's tendency to stereotype people of the other gender is far from easy. The same applies to stereotypes of ethnic, racial, religious, or age groups. Such fundamental change in the cultural dimension, however, is prerequisite to any significant and lasting change with regard to gender and diversity. Recruiting a larger number of women in a male-dominated organisation does not automatically change the way male staff value the work or leadership styles of women nor does it stop men from making jokes about their female colleagues. More needs to be done to realise changes in valuation and the way it is expressed. In other words, changes in gender roles, valuation, access and control over resources, decision-making, and so on require well-planned action.

This well-planned action towards organisational change consists of several steps (see Box 3). Most steps are common to planning and implementation processes. In processes of gender-related change the first steps, however, should not be overlooked. The first step is to scan carefully the organisation to find out whether change is feasible and worthwhile, because the process of change could do more damage than good. Second, paving the ground by creating willingness and the support of superiors and colleagues will ensure a smoother journey towards change.

Box 3: Steps in planned organisational change (addressing gender issues)⁶

1. Scouting

Scouting is a simple/discrete diagnosis of the situation in the organisation to:

- determine whether change is feasible and worthwhile and
- identify the appropriate entry points = the people who have the required power and interest in the change. It is important to find out what drives and motivates them.

2. Establishing willingness to the change process and getting permission to take a leading/facilitating role in this process

Note: it is important to consider if your job description includes actions to change certain situations. How much 'authority' do you have? to what extent do and/or will people (colleagues) accept you in the role of 'change agent'?

3. Diagnosis

Diagnosis concerns the following aspects.

- Find out what the situation regarding gender in the organisation is and why it is like that.
- Define the problem; it includes finding out where the problem comes from (external and/or internal sources) and why it is seen as a problem, by whom it is seen as a problem and by whom not.
- Identify pressures for and against change.

Based on this diagnosis the next sub-steps are important.

- Set goals (long term!).
- Identify resources (financial, human).

A useful instrument for making a diagnosis is the SWOT analysis.

4. Planning

Planning means who is to do what, when, where, and how. The following aspects are important to include in the planning stage.

- Establish immediate, concrete objectives for change.
- Define indicators to monitor and evaluate the process and output of change.
- Develop alternative strategies. One should realise that an organisation is diverse by nature - people have different positions, different tasks and responsibilities, different interests (and resistances). Consequently, various strategies may be appropriate for reaching the objectives of change.

Moreover

- look for potentials, do not focus on barriers,
- build in flexibility,
- think about possible consequences of certain strategies for the various groups or individuals, and
- listen to the 'silent voices' – (other) opinions on gender that are not easily heard.

⁶ Based on Kolb and Frohman in Kolb et al. (1995)

5. Action

Or: implementation of change interventions.

It is important to:

- recognise resistance (being a natural reaction!), and
- monitor and adjust.

6. Evaluation

Or: assessment of the progress made after fixed periods.

Important questions are: should the process continue? what is the prize, for whom, if we (do not) continue? how to continue?

7. Institutionalisation

Or: maintenance of the change.

Intermezzo: resistance to change

Gender is a sensitive issue and any change in gender roles and relations generally creates more resistance than most other issues in organisations. Extra efforts are needed to motivate people for change, at least not to hinder it, and therefore recognising resistance and dealing with resistance are important (see also Part 3 - Section 3). In Box 4 some common forms of resistance within organisations are explained, based on experiences with gender-related change: denial; inversion; dilution; selection; subversion; compartmentalisation; shelving; investigation; lip service; and tokenism

Following the 'labelling' of the type of resistance the question 'why do people resist' needs to be answered to properly deal with resistance. Individual resistance may come from a variety of sources, a number of them are collected in Box 5.

Box 4: Forms of Resistance to Balancing Gender Relations (Sher 1996)

Denial	<u>Complete rejection of the existence of gender differences or discrimination against women.</u> The claim is that 'here women have equality of opportunity, individuals gain positions and promotion purely on merit; the problem is merely to encourage women to take advantage of the opportunities given to them.'
Inversion	<u>'Putting the blame on the victim.'</u> Elaborating on the claim that equality of opportunity exists, it may be further claimed that it is women's own fault if they are not participating sufficiently or not coming forward to take advantage of the opportunities already open to them.
Dilution or Selective Denial	<u>Admitting that there are problems related to gender but they are of a practical nature.</u> Women may have differential access to facilities or careers, but structural problems related to men's control of resources or positions do not exist. 'There is no discrimination against women.'
Selection or Perpetuating Dilution	<u>Selection of certain priorities: selectively excluding priorities which explicitly address gender issues</u> or limiting organisational priorities to certain accepted roles of women or men not trying to balance gender relations.
Subversion or Sabotage	<u>Pursuing gender issues in a manner calculated to keep the situation as it is.</u> Using standardised bureaucratic procedures is very effective, e.g. inefficient forwarding simple administrative decisions to a high level management committee. Or simply 'losing a file'.
Compartmentalisation or Institutionalised Subversion	<u>Giving the responsibility for women's or gender issues to a separate Women's or Gender Officer, Unit,</u> which often means sidelining and regulating issues as 'separate issues'
Shelving	<u>Delaying decisions or actions:</u> 'the time is not ripe yet, but the goals are desirable'.
Investigation—a more sophisticated form of shelving	<u>Suspending all actions pending the results of a deeper study or research into the matter,</u> often a last resort strategy.
Lip service	Verbal enthusiasm <u>not matched by any action (a form of shelving).</u> Often the jargon or concepts of gender are used as surface rhetoric but action does not follow.
Tokenism – a form of lip service	<u>Having a token woman (or man) in all discussions to address gender issues and to acknowledge 'the woman's (man's) point of view'.</u> She or he can give valuable advice but after token respect is given follow-up or serious attention is lacking.

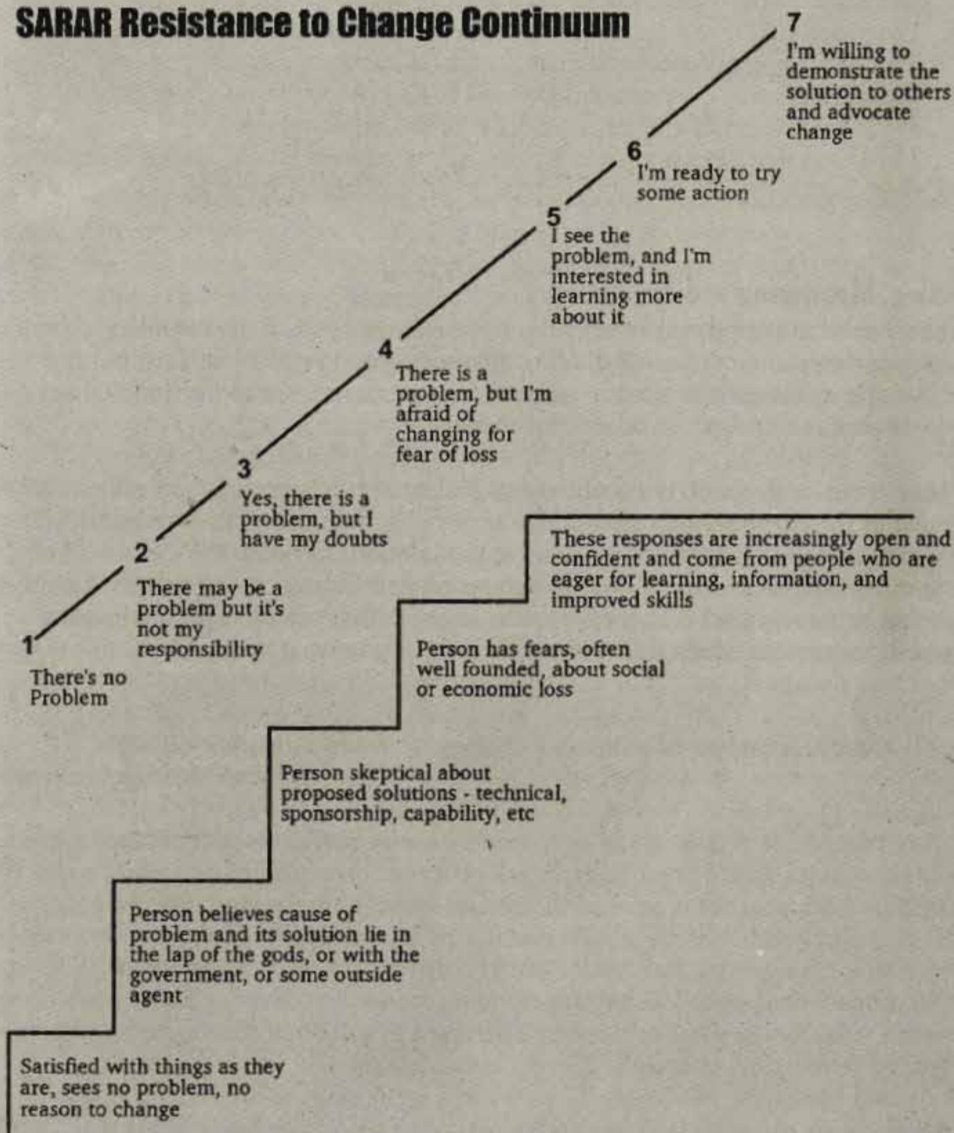
Box 5: Examples of Sources of Individual Resistance⁷

- Feeling out of control
- A high degree of uncertainty from not knowing where the change will lead
- Lack of time to mentally adjust to changes
- Stress caused by too many changes that force attention to issues that were formerly routine
- The feeling that one is compelled to defend the status quo because doing otherwise would involve a loss of face
- Concerns about future competence when the basic rules seem to be changing
- Personal plans may be affected by the change
- Greater work and energy demands necessitated by the change
- Past resentments
- The real threat posed by a change through which some people will be winners and others will be losers
- Threat to expertise
- Threat to established power relations
- Threat to existing/established resource allocation

⁷ Based on Kolb et al. (1995)

Another useful tool is the SARAR Resistance to Change Continuum (SARAR stands for a participatory training process), which helps change agents identify stages of individual resistance or, put positively, motivation.

SARAR Resistance to Change Continuum



People may resist individually, but we can also encounter group resistance. It is difficult to say which one is more complicated to deal with. Resistance by a larger number of staff members can be a serious threat when the people belonging to the group are powerful or influential, and thus may get more and more followers. A kind of typology for the sake of easier identification is presented in Box 7.

Box 7: Group resistance/motivation within an organisation related to address gender issues⁸

1. The group that does not recognise gender issues as a priority and who will argue its case ('tough guys').
2. The group that, for whatever reasons, acknowledges gender issues, but in such a fashion as to raise more questions than it resolves.
3. The group that is self-critically concerned to take gender issues on board, but who, for different reasons, is unable to do so satisfactorily.
4. The group that is clear and enlightened in its analysis but which represents a sector that does not embody a priority for the organisation.
5. The group that likes to take initiative, also to address gender issues ('innovators').

Planning, Monitoring and Evaluation

The other steps in the process of organisational change concern the common steps of planning and implementation—including monitoring and evaluation. Last, but not least, specific attention is needed to make change permanent or to institutionalise change to avoid temporary or occasional changes.

The Nine Boxes framework is a useful tool for planning, monitoring, and evaluation. A diagnosis of the organisation's situation in terms of gender using the framework will reveal elements to be addressed. Looking at the relations between the elements helps to find opportunities and limitations to gender-related change. Based on this diagnosis, a plan can be made to set priorities, counter setbacks that can be expected in other 'elements', determine which staff will be involved and in what way, and so on.

Box 8: An illustration of planned change towards gender equity

Source: Verona Groverman

The diagnosis of a regional agricultural training centre revealed a rather blank picture in terms of gender. In the organisation itself no attention is paid to gender. The elements of the technical dimension scored almost 'zero' in terms of gender: no policy nor action plans, no gender differentiated monitoring and evaluation, no tasks nor responsibilities related to gender, few female staff, no attempts to recruit gender-sensitive women or men, no special facilities for women, and so on. About 17 people, two of whom are women, work in the centre, all involved in training extension staff and male and female farmers, though with different responsibilities.

Gender is not on the agenda in any decision-making process as far as it concerns the position and conditions of men and women in the organisation (element: decision-making). Gender gets attention in terms of the participation of women farmers in training, but gender is not part of the curricula. Neither male nor female staff members feel they are given preference in work or appraisal of work. Female staff are

⁸ Based on Macdonald et al. (1997) and Eade in Wallace and March (1991).

supposed to assure the participation of women in training.

Some staff members discuss gender matters out of interest and because they feel that training is lacking to properly address the situation of women farmers. This interest is to a great extent influenced by several policies at the national level, emphasising the participation of women in development in agricultural training. The regional agricultural training centre has close ties with the central office and with the women's division of the Ministry of Agriculture. This division, promoting attention to women farmers, provides, for instance, certificates to training centres, where women's participation is being increased. To the regional centres it certainly is an incentive (element: policy influence). In other words, these external factors can be considered as opportunities for change.

A major external constraint is the prevailing recruitment policy that dictates that recruitment is determined at the central level of the government. This policy prevents the centre from recruiting more women or from setting gender-sensitive selection criteria. The situation within the organisation as depicted shows a number of constraints towards change related to gender. There are also some positive factors towards change, for instance, the interest in gender amongst a small group of male and female staff, the small size of the centre, and an open atmosphere for discussion and team work. One of the most important potentials for change is one staff member who opted to take part in training on gender and organisational change not only to increase his understanding, but also to apply it to change in his organisation. The management gave him permission to attend the training – an example of providing 'room for manoeuvre'.

Based on the gender diagnosis of the organisation, he drafted a personal action plan to make gender part and parcel of the work in the centre – his long-term aim. This aim is not linked to one box only but covers all boxes. His strategy was to first change the existing attitude towards gender among colleagues (element: 'attitude'), assuming that another attitude would positively affect the decisions taken in the centre (element: 'decision-making'). Critical decisions would concern the action plans of the centre (element: 'policies and actions'), especially those related to curriculum development. He felt that the government policies on women and development would provide him with the justification to increase attention to women.

He planned a number of activities based on the strategy. He chose a mixture of informal and formal meetings to influence the attitude of his colleagues within the centre and related departments. He took the opportunity to approach staff of other departments during a workshop that had been planned already. Moreover, in a formal meeting with senior staff he tried to get permission and increase commitment to establishing a small gender unit within his centre. With his colleagues he held informal discussions during lunch hours and free time to slowly build a group of 'like-minded' supporters for gender.

Part of planning is the development of indicators for monitoring. The extent to which the aim of the change process is being realised should be followed as closely as possible. Here the framework is also useful: for each element relevant indicators can be developed. In Table 3 examples of indicators are given.

Proper planning of actions and implementation, however, cannot be considered a technical matter only. They go together with processes in which several persons are involved. Resistance has to be overcome, continuous motivation is necessary to gradually realise change. This requires, apart from 'technical' knowledge and skills in planning, monitoring, evaluation, and so on, social insights and skills - issues which we address in the next part of this manual. We end this part with some lessons learned from experiences with gender-related change in Box 9.

Box 9: Lessons learned about gender and organisational change⁹

- Organisational changes (only) occur through individual changes in key members.
- No change will occur unless there is motivation to change.
- Change is a time-consuming process and is hard work for the 'change agent'.
- On methods: initiate change through informal discussions to get feedback and to promote participation. Use interviews and group discussions, study - also study culture ('where does resistance come from').
- Think through the change: what it will mean for all parties involved; many forms of change will hurt people and create resistance.
- Look for points of common interest among the different parties concerned.
- Take inter-relationships between all elements of the organisational framework into account.
- Look for potentials for change during the process (newly emerging 'strengths').
- Making change is as important as deciding where to change.
- Network with allies within and between organisations.
- Start small and slow - learning comes from doing.
- Build out and up from grass roots' success (use pilots as examples to create enthusiasm).
- Work first towards building up a critical mass = the smallest number of people and/or groups who must be committed to a change for it to occur.
- Make use of already existing energy, for instance a situation fit to change, people willing to change, existing resources.
- Involve other people in the process: it will commit them if involved in brainstorming, analysis, looking for solutions.
- Be flexible and tailor the approach to different groups of people in the organisation.

⁹ Based on experiences described in Itzin and Newman (1995); Hussey (1997); Macdonald et al. (1997).

Table 3: Possible indicators for monitoring gender-related organisational change
The boxes refer to the Nine-Boxes framework

Technical dimension

Indicators Box 1: Policies and actions	Indicators Box 2: Tasks and responsibilities	Indicators Box 3: Human resources
<ul style="list-style-type: none"> ▪ draft policy on gender (external regarding programmes and internal) exists ▪ draft policy on gender is approved ▪ steps are taken to integrate gender in organisation's overall policy/sector policies ▪ gender is incorporated in the overall policy/sector policies ▪ extent to which decisions and actions taken at the management and implementation level reflect the policy on gender ▪ extent to which action plans and strategies are applied to address conditions and positions of men and women at structural and cultural level ▪ extent of differentiation of monitoring according to gender ▪ extent to which evaluation includes effect and impact on men/women ▪ extent to which M&E are used to adjust policies, actions and strategies from a gender perspective 	<ul style="list-style-type: none"> ▪ number/percentages of men and women at different levels of the organisation ▪ number/percentages of men and women in different positions ▪ number of levels and positions at which gender issues are addressed ▪ extent to which gender is integrated in tasks and responsibilities of staff and put into practice ▪ extent of consideration of gender in procedures and rules ▪ extent of exchange of and discussion about information on gender in the organisation ▪ level and location of coordination as regards gender 	<ul style="list-style-type: none"> ▪ number/percentage of men and women staff in different positions and with different jobs qualified to address gender issues ▪ extent to which recruitment procedures are based on principles to balance staff composition in terms of gender ▪ extent to which recruitment/appraisal criteria include gender sensitivity and capability ▪ extent to which facilities and physical infrastructure are women and men friendly ▪ extent to which relevant job descriptions address gender issues ▪ extent of accessibility to and utilisation of training by male and female staff

Sociopolitical dimension

Indicators Box 4: Policy influence	Indicators Box 5: decision-making	Indicators Box 6: room for manoeuvre/innovation
<ul style="list-style-type: none"> ▪ extent of commitment from different actors at decision-making level (board, management, etc.) towards addressing gender issues ▪ extent of taking action to achieve gender friendliness at decision-making level ▪ extent of openness from the side of management towards views concerning gender from within and outside the organisation ▪ extent of influence of external individuals, groups and organisations on policy development regarding gender 	<ul style="list-style-type: none"> ▪ number/percentage of women and men staff articulating/consulted in discussion on main issues in the organisation ▪ number/percentage of women and men staff taking part in decision-making on main issues ▪ extent to which gender committees, units, working groups, etc are operational and take part in decision-making process ▪ extent to which programmes-related and internal gender issues are taken into consideration in decision-making and taken into action ▪ extent to which control mechanisms (financial, reporting, quality, performance) are equally applied towards men and women ▪ extent to which conflicts within the organisation are solved from a male or female bias 	<ul style="list-style-type: none"> ▪ extent of equal treatment of men and women as regards rewards and incentives ▪ extent of equal opportunities for men and women staff to develop their career ▪ extent of difference between male and female staff to "give shape to their work" (in an innovative way) ▪ extent to which dealing with gender issues is valued and rewarded as any other subject ▪ extent to which ideas, proposals, suggestions are taken seriously irrespective of whether they are brought forward by men and women staff

Indicators Box 7: organisational culture	Indicators Box 8: cooperation/learning	Indicators Box 9: attitude
<ul style="list-style-type: none"> ▪ extent to which the image of the organisation is women and men friendly ▪ extent to which the organisation demonstrates gender-friendly behaviour in terms of language used, jokes, comments, images and materials displayed, styles of meetings, procedures on sexual harassment, and so on ▪ extent to which diversity of styles between men and women are considered a source of strength for effective running of the organisation ▪ extent to which paying attention to gender is considered a standard of work ▪ extent of shared values among staff about equal opportunities for men and women within the organisation 	<ul style="list-style-type: none"> ▪ extent to which both male and female staff participate equally in team work ▪ extent to which male and female staff support each other irrespective of the subject they deal with ▪ extent of willingness to learn and cope with institutional changes especially in the field of gender ▪ extent of communication and integration of new ideas in the field of gender in different disciplines, divisions, and so on ▪ extent of willingness to link with other organisations dealing with gender and extent of effectiveness of the linkages. 	<ul style="list-style-type: none"> ▪ individuals are against any discussion about gender or raise a number of questions ▪ individual staff member feels that gender issues should be dealt with – but not by him/her personally ▪ individual staff member is interested to learn more about gender issues ▪ individual staff member is motivated to address gender issues – and makes efforts ▪ individual staff member takes an active role in bringing and keeping gender issues on the agenda at programmes and at the organisational level ▪ extent to which individual staff member shows gender-friendly behaviour (stereotyping, jokes, and so on)

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EXERCISES: ORGANISATIONAL CHANGE AND GENDER

L. Organisational change and gender – awareness raising 1

Aim of the exercise: 1) To better understand organisational change. 2) To become aware of the effect of change on gender

Time: 45 minutes

Method: reflection, discussion

Materials: pen, paper, whiteboard, handout -organisational framework (Table I in this manual)

Steps

1. Discuss organisational change and gender.
2. Ask each participant:
 - a. to describe one major change which has occurred in her/his organisation and one minor change (they can use the Nine Boxes framework to get ideas);
 - b. to describe the effects of each type of change (again let them use the framework to fully consider the effects); and
 - c. to describe what has caused the changes – people or events, external or internal.
3. Form small groups and let group members discuss the changes described. Do they assess them as positive or negative? Why? Let them choose one major and one minor change to present to the plenary. They should describe: the nature of the change, the effects, the cause(s), their assessment. The two selected changes do not have to come from the same organisation.
4. Discuss the outcomes in the plenary. Point to changes related to gender.

M. Organisational change and gender – awareness raising 2

Aim of the exercise: to better understand organisational change and gender-related change

Time: 45 minutes

Method: reflection, discussion

Materials: pen paper, whiteboard

Steps:

1. Ask each participant:
 - a. to think about a major change that has taken place in her/his organisation; and
 - b. to look from a gender perspective to the change: have roles, opportunities, conditions and positions of men and women been affected differently? have relations between them been affected? in what way and why?
2. Form small groups and ask them to exchange views.
3. Discuss the major outcomes and observations in the plenary.

N. Changing is not easy – raising awareness

Based on Pretty et al. (1995) pp 154

Aim of the exercise: to show how complicated it is to change habits and to follow new rules

Time: about 10 minutes

Materials: None

Steps

1. Ask the participants to stand up and form a circle.
2. Tell the participants: 'We are going to do something very easy, i.e., count to fifty. There are a few rules. Instead of 7 or a multiple of 7 clap your hands. If someone says seven or a multiple of seven, then we start again.'
3. When someone accidentally says seven or a multiple than start the counting at another part of the circle.
4. After some minutes, discuss why the exercise was so difficult and what the relevance of this experience is in initiating change processes.

O. Understanding organisational change, culture and gender

Aim of the exercise: to show what can be the positive and negative effects of efforts of an organisation to address gender issues in a particular context.

Time: 2 hours

Method: case study, discussion

Materials: hand out paper, pen, whiteboard, handout of exercise O (article of Goetz), hand out organisational framework (Table 1)

Steps

1. Explain that we are going to look at the experiences of an organisation operating in a specific social and cultural setting. The organisation has taken various measures to address gender issues as related to space, time, health, and sexuality. Three groups will be formed in which each of these issues will be critically considered. Give the article as a handout.
2. Ask the participants of each group to read the paragraphs relevant to their group and to discuss the following.
 - a. In what ways the organisation tried to make the organisation gender-friendly and how it worked out in practice. Try to connect the measures with the different elements in the Nine Boxes framework.
 - b. To what extent do they recognise the situation described in that of their own organisations. To what extent could the measures taken be used in their own organisation and context? Let them write the main observations and arguments on a flipchart.
3. Discuss in the plenary the outcomes of the groups connecting the issues of space, time, health, and sexuality.

P Making a SWOT analysis of the own organisation

Note: this exercise usually needs guiding from the facilitator(s).

Aim of the exercise: to better understand the situation of the participant's organisation to enable the identification of options for gender-related change.

Time: 2 1/2 hours

Method: individual exercise, discussion

Materials: paper, pen, whiteboard, handout of exercise P (SWOT analysis), hand out organisational framework (Table 1).

Steps

1. Explain the exercise to the participants. A SWOT analysis is an instrument for diagnosing an organisation in order to discover the pressures for and against change. SWOT analysis is preferably carried out by a group which discusses the strengths, weaknesses, and external influencing factors from different perspectives. These perspectives are coloured by the views of individuals about how they see gender roles and relations and their visions about 'ideal' roles and relations. In this exercise only one perspective is highlighted: that of the participant. Note that it is important that the participant is more or less clear about her/his vision of a gender-friendly organisation because this is the 'ideal' she/he should use to measure strengths and weaknesses.
2. Ask participants individually to make a SWOT analysis using the Nine Boxes framework as follows.
 - a. Describe to what extent gender differences are recognised and addressed in each 'element' or framework box. Use can be made of the outcome of exercise I (Part 2). Explain why the situation is as it is. It helps to find indications for openings, bottlenecks, or future perspectives for gender-related change, providing keys to answer the next questions.
 - b. Assess each element in terms of main strengths and weaknesses. Assess from a historical perspective: the absence of a gender policy may be perceived as a weakness, but if discussions about policy formulation are taking place at senior level, the future may look promising and less 'weak'.
 - c. Analyse the strong and weak points observed from the point of view of change: which weak points can be changed and which strong points can be made use of to make the organisation gender-friendly.
 - d. List the external factors that influence directly or indirectly the situation regarding gender in the organisation. For instance, existing networks, legislation, government policy on gender, pressure groups, religious beliefs, image of women in society, changes in government, number of female-headed households, participation rate of women in education, communication techniques, women's training centres, and so on.
 - e. Consider which factors favour addressing gender issues in the organisation, i.e., opportunities, and those obstructing change, i.e., threats.
3. Discuss in the plenary major problems faced in doing the exercise and, at random, outcomes from individual participants.

Q. Making an action plan for organisational change in terms of gender

Note: this exercise usually needs guidance from the facilitator(s).

Aim of the exercise: to make a draft action plan to change the organisation into a gender-friendly organisation.

Time: 2 hours

Materials: paper, pen, whiteboard, handout organisational framework (Table 1), hand out indicators (Table 3), hand out of exercise Q (the planning table)

Steps

1. Explain the exercise: making a draft action plan to realise the first steps towards a gender-friendly organisation based on the participant's personal perspective about how her/his organisation would look like if it were gender-friendly. Note that this draft action plan requires further discussion in the organisation for adjustments and, next, implementation.
2. Ask each participant to make a step by step plan to change her/his own organisation to a more gender-friendly organisation. Use should be made of the SWOT analysis of the own department/organisation (exercise P).
 - a) Describe the aim of the action plan: what do you want to achieve in 6 - 12 months from now (short-term aim) and in the long term? Be clear about the unit you want to change: your organisation as a whole or a department or any other unit.
 - b) Describe your work plan: the concrete activities to be undertaken for that period of 6 - 12 months, and specify when and where and for whom (target group) these will take place. The Nine Boxes framework can help you to prioritise activities. The table attached to this exercise can be used for planning purposes.
 - c) Give indicators to enable you to see to what extent you are on track (the Nine Boxes framework or handout on indicators can also help you to develop indicators).
 - d) Describe:
 - who you are going to involve during preparation of the activities, in implementation as well as monitoring and evaluation of the activities, and
 - how you are going to convince these various people to support you and/or to cooperate with you - this concerns the process!

Thus, your action plan will consist of the following sub-chapters.

- a. Objective and justification of your plan and your objective
 - b. Activities and indicators, target group and time schedule, including monitoring
 - c. Process of involvement of other people
3. Form small groups to exchange the plans. Let the group members choose one plan to present to the plenary.
 4. Ask the participants selected to present the plan and let others give comments in a constructive way.
 5. Afterwards give all participants 15 minutes to adjust their plans from the comments and ideas given.

Variation

The presentation could be made to a panel of outsiders who comment on the plans

presented from their experiences with gender and organisational change.

HANDOUTS

Handout of Exercise O: organisational change, culture and gender

(Goetz 1997, pp 17-27)

This article examines the experiences of women and men staff in the world's largest national NGO, the Bangladesh Rural Advancement Committee (BRAC), to investigate the impact of the organisation of space and time on women's capacity to become effective development workers.

The way development organisations structure everyday work through space (approaches to field work, organisation of office and living space) and through time (structure of the working day and of the relationship between career and life cycles) reflects the physical and social capabilities of those who dominate organisations. Where an organisation is dominated by men, the institutional time management of working hours and life cycle career paths can reflect men's relative liberation from child care and domestic responsibilities. This allows them more time for work or institutional interactions outside the home. They have cultural rights to mobility and autonomy outside the home, and this may be reflected in the organisation's expectations about the amount of travel that employees should undertake.

These practical, everyday aspects of the way organisations structure their work are a feature of the organisation's culture; they will be reflected in performance criteria, rewarding people who flourish within the physical and social (or spatial and temporal) boundaries of the organisation. When organisations take on new participants, such as women staff and women clients, and new objectives, such as promoting women's interests in development, the organisation of space and time can affect the capacity of women staff to compete with men and to become effective development workers. The way these patterns reflect and reproduce the organisation's culture and objectives can affect the capacity of all staff-men and women - to promote gender and development concerns; to work effectively for women's interests.

BRAC maintains a strong commitment to gender equity in its anti-poverty programmes, including an impressive rural credit programme, the Rural Development Programme (RDP), offering credit and income-generating skills and inputs to, at the time of this study, well over 700,000 members, 70% of them women (by 1995 women were 85% of borrowers). Part of BRAC's commitment to gender and development goals is reflected in its efforts to employ women, although there is such a high drop-out rate among women staff that they represent only between 15 and 25% of the total staff.

Women staff are in an important and sensitive position in relation to the way BRAC is regarded by village people. In a conservative environment, such as that of rural Bangladesh, the presence of women in non-traditional roles will be particularly noticed and comments will be made about it. This puts rural development organisations that pursue progressive and counter-cultural social goals in a difficult position. In order to accomplish their work, they must respect the social order and cultivate local support. But, at the same time, their very presence in rural development work is a symbol of the 'progressive' or 'modern' character of the organisation. BRAC consciously projects this progressive image, insisting that women ride bicycles and motorcycles, wear the

'shalwar kamise' rather than the sari, and live and work together with male colleagues in offices in rural areas, away from their immediate family. These requirements press heavily upon the personal proprieties of young women in a culture that places a high value on sheltering unmarried women. High degrees of mobility for young women, accommodation away from the family with non-kin men, all place their personal integrity in doubt. They are under pressure to demonstrate the organisation's progressive image, yet at the same time preserve their 'honour', particularly if they intend eventually to marry. They are social pioneers as development agents, yet this can be at an extremely high personal cost. These contradictions account, in part, for the high drop-out rate of women staff.

BRAC has introduced policies that aim to enhance the retention of women staff and their effectiveness as development workers on three levels:

- Increase their presence in the organisation and their participation in decision-making (recruiting women in greater numbers, adopting 'fast-track' promotion policies for women, providing special training in management skills).
- Facilitate their physical adjustment to the demands of the workplace and their role within it (for example, making arrangements for accommodation, addressing issues of mobility, and organising essential health care and maternity leave).

The following discussion highlights these problems, which are in no way unique to BRAC. BRAC should be applauded for its openness in exposing its operations to external researchers and for its alacrity in responding to the sensitive issues of gender-based inequalities among its staff and in their work.

The 'Gendered' Organisation of Space

The way most rural development organisations approach the issue of physical space reflects not only men's physical capacities, but male social freedoms. Men are able to travel long distances alone, they are able to live with strangers in office accommodation without their physical integrity and security coming under threat, or their personal honour being damaged.

Living Arrangements

BRAC has a well-developed infrastructure of rural offices that also serve as living quarters for staff. These are busy centres from which credit is dispensed and training courses are offered and where supplies are stored and paper work is conducted. All regular staff, field workers (Programme Organisers – POs—and their office managers (Area Managers – AMs) are housed in these Area Offices, with POs sharing rooms. Only the AM has the right to have a family resident in the Area Office. The majority of POs are single however; and those who are married are generally living away from their marital families. There is a guest room for family visitors. Thus, few staff, male or female, have domestic or family responsibilities to distract them from work obligations. All staff eat together, and their meals are provided by a cook, which frees staff from concerns with shopping and food preparation.

When women live with men to whom they are not related, their personal integrity is questioned and their physical security is at risk. Women and men POs live on separate sides of courtyard spaces at the back of the offices. BRAC has responded to some of the gender-related problems by establishing a set of 'community living' behavioural

norms which reiterate BRAC's egalitarianism and also respond to some of the challenges of larger numbers of women staff. One of these norms stipulates that women and men must never enter each other's rooms, and others stress the importance of respectful behaviour between women and men.

Travel and mobility

Rural development work requires high degrees of mobility under difficult conditions. Staff must travel considerable distances each day to reach the village groups they supervise. In the heat of the dry season travel becomes very strenuous and exhausting. POs are supplied with a bicycle and must cycle for six months to a year, after which they ride motorcycles. Both women and men POs in BRAC travel between 11 and 17 kilometres every day. All AMs travel by motorcycle.

Bangladeshi women face problems when travelling in rural areas. In recognition of this, BRAC tries to ensure that the village groups which women staff supervise are close to the office and clustered together to minimise the distances that women staff travel. This can sometimes cause resentment among men, who have to travel further. Women travelling alone in rural areas is itself a new phenomenon; travelling by bicycle or motorcycle is very unconventional for women. BRAC provides gender-segregated training for staff on riding bicycles and motorcycles. It also makes sure that women gain support from the fact that other women in an operational area are also using bicycles and motorcycles.

Many of the women staff said that they faced considerable hostility from villagers because of their freedom of movement, and they also feared for their safety. It is widely held within BRAC that the main reasons for the high, early drop-out rate of women staff has to do with their reluctance to ride bicycles. Some women staff said that villagers, especially young men, often tried to make them fall off their bicycles by distracting them, throwing sticks into the spokes of their wheels, or chasing them.

There are some important advantages for women in riding these vehicles. First, it has a strong public impact and can help in changing attitudes to women's mobility. Some women in village groups expressed their admiration for BRAC women field workers because of their courage. Second, some women said they felt that travelling by motorcycle is a status symbol and can enhance the status of women field workers. And third, many women expressed a feeling of pride and accomplishment in their freedom of movement and their skill.

Time and gender

Organisational systems for managing time affect staff in the office and the field in terms of the pattern of the working day, and also of a lifetime's career.

Managing time day-to-day

Rural development work requires activities that cannot be confined within the normal nine-to-five office day. Village women's groups may be most accessible for development workers very early in the morning, before the working day begins; while men's groups may only be available for discussion at night, after dark. Crises in villages do not respect weekends or office hours and can require responses from staff at unconventional times.

Having staff living in the office also means that the office, in effect, is never closed. For many staff, the working day does not end until 10pm.

The intensity of work in the field, and the spreading of working hours beyond normal office hours, means that women with families will lack time for domestic responsibilities and will have to bear the costs of child care and domestic help. Some of these difficulties become apparent when examining the living arrangements for married staff. Only 25% of married women POs and AMs lived with their spouses and children, compared to 50% of married men.

It is difficult for women staff living at the Area Office to find time to spend with their husbands. The guest room only allows couples to stay together for very short visits. At the same time, the working culture is such that there is little spare time for visits and also staff members within the compound can be disapproving.

Life-cycle career time-management

The typical career path followed by the majority of staff in any organisation will reflect what, over time, has been the most effective way for employees to manage the relationship between their lives and their work. This means striking a balance between significant events in their lives - such as acquiring qualifications, gaining job experience, getting married, having children - and performing well in the organisation in order to move up promotional ladders. In BRAC, the typical life-cycle career path relates to the way men organise their lives and their work.

A staff member will typically join at the level of a PO at the age of 27, after having completed a Master's degree. A minimum of two years' field work is expected before promotion to AM. At this point, the staff member acquires more personal space in BRAC living quarters: big enough to have a family. This is also one of the periods of the most intense activity in the field, involving considerable long-distance travel to regional offices and the head office, very long hours, and substantial responsibility. Ten years of this, and there may be a chance of promotion to the position of Regional Manager, or to head office.

For women, this life-cycle career path poses considerable difficulties. At 27, many women may already be married, and since BRAC prefers to hire single people, this may discourage them from applying for jobs. On promotion to the AM level, women will be given space at the Area Office to accommodate a family, but they will have difficulties persuading their husbands to come and live in the Area Office, as husbands are often unwilling to abandon jobs and move to follow their wives. Among married staff who had been transferred, more married women with children than men with children had to move without bringing their spouse or children with them.

If women have children, it becomes very difficult for them to manage the intense demands of work that they face as field managers. Another problem is that the kind of work they do may dissuade prospective partners from marrying them at all.

Women are thus placed in an ambivalent situation. While working for BRAC may give some a much-wanted opportunity to avoid early marriage, it may make it more difficult to marry, and, in a culture in which marriage is almost universal, this may encourage

women to leave. This is a great loss to BRAC, postponing the development of a cadre of experienced women staff who are able to make a sustained mark upon the organisation and its work.

Child care

Child care and domestic labour tend to remain the responsibility of women even though they work full-time, and this undermines their ability to compete with men at work and develop their own capacities. Our research showed that not one woman was able to rely on a spouse for child care, and the majority relied on a relative for this service. While most respondents felt reasonably secure about leaving their children with relatives, those who relied on servants felt uneasy about the quality of care their children were receiving. Long working days and residence at the Area Office mean that there is little flexibility for parents to respond to family emergencies.

Over half of married BRAC women faced objections from their husbands because their work caused them to neglect their domestic obligations.

All staff, of course, have the right to take leave to fulfil family responsibilities, and BRAC has introduced a special provision in recognition of women's greater family obligations – they are allowed an additional six days leave a year. Also, AMs are encouraged to allow new women recruits leave within their first month in order to cope with homesickness and to reassure their families. The intensity of work in a rapidly expanding organisation, however, means that staff do not always take up their entitlement to leave. The nature of the working culture is such that people who do not take leave are highly regarded for their commitment and dedication. Women who take their leave may therefore be derided for lacking commitment, or resented by men who do not take as much leave. Indeed, supervisors often indicate on staff appraisal forms that staff have not taken leave: this is seen as a sign of commitment.

Health and sexuality

The organisation of space and time has an impact on the health of staff and on how they manage their sexuality. Organisational culture affects the ways the physical capabilities of men and women are valued or, alternatively, derided.

Health

The rigours of working in rural areas require stamina and can result in health problems for both men and women. Our research showed that as many men as women are exhausted by fieldwork. The majority of field staff of both sexes who reported problems said that their main problem was fatigue and physical strain.

Gender issues in health

Women experience particular health problems caused by the absence of certain basic facilities in the rural environment. For example, there are few eating facilities in the field appropriate for women, who often do not feel comfortable eating in public restaurants. Women often skip meals, which contributes to gastric problems and feelings of exhaustion.

There are no sanitation facilities in the field for women, and modesty prohibits them from using bushes in the way men can. Women staff said they would avoid drinking

water during the day because of this. Insufficient water in a hot and exhausting work environment can result in dehydration and can exacerbate urinary tract infections and difficulties managing menstruation. BRAC proposed to make sure that proper latrines were built in every village where women worked. Unfortunately, the resentment that men express about the special measures sometimes needed to accommodate women's bodily needs suggests that these needs are treated as constraints on the organisation, rather than simply a necessary feature of working with women.

Reproductive health issues

Women also experience problems related to their reproductive health. BRAC gives three months' maternity leave to women staff, and this is generous by local standards. About half of the women in the sample who had children had trouble adjusting once they returned to work, in particular because there are no breast-feeding facilities in field or head offices, and it was difficult for them to arrange for satisfactory milk substitutes.

Menstruation raises a set of problems in a work environment with inadequate facilities in both the field and office. Where work requires physical activity such as bicycling, menstruation can be a problem because of the discomfort and pain that some women experience. BRAC has an innovative policy of allowing an optional two days of 'desk leave' for women staff every month. The desk-leave policy represents an important form of organisational adjustment to accommodate women's physical needs. Unfortunately, taking desk leave sends out a signal that one is menstruating, and women feel ashamed of making other colleagues aware of this fact. As a result, many women do not take advantage of this facility. Some said that they only felt comfortable asking for leave if their boss was a woman.

Sexuality

BRAC's policy on personal relationships demonstrates problems in managing sexuality within an organisation. BRAC, quite rightly, is deeply concerned about discouraging sexual harassment, which is probably the most severe constraint on women's capacity to work effectively and to develop credible leadership capacities. However, women in BRAC felt that the organisation's concerns over sexual propriety were expressed through constraints on their behaviour, rather than on that of their male colleagues. This illustrates gender bias in patterns of managing sexuality within the organisation.

Handout of exercise P: A SWOT analysis

A SWOT analysis is a framework for analysis of internal and external factors, which influence the functioning of the organisation. SWOT stands for the following.

S - Strengths - the factors of an organisation that are functioning well. In our case it refers to the different 'elements' (boxes in the Nine Boxes framework) of an organisation in which gender issues are recognised and well-addressed.

W - Weaknesses - the factors of an organisation that are not functioning (properly). In our case it refers to the different 'elements' (boxes in the Nine Boxes framework) of an organisation in which gender (issues) is not, or hardly, recognised and addressed.

O - Opportunities - external factors promoting proper functioning of the organisation, now or in the future. In our case it refers to the external factors that (may) promote or help the organisation become more gender-friendly towards its staff and its products.

T - Threats - external factors preventing or hindering proper functioning of the organisation. In our case it refers to external factors that (may) prevent or hinder the organisation from becoming more gender-friendly.

Handout of exercise Q: Table for planning purposes

Activity	By whom: you and/or ... (resource person, ally, etc.)	'Target group'	When	Where	How = method	EXPECTED OUTPUT	INDICATOR TO MONITOR/ EVALUATE



Part 3
Facilitators of the Process
of Organisational Change
(Change Agents)

INTRODUCTION

In this part of the manual we focus on the actors who initiate, facilitate, and guide the process of planned organisational change regarding gender. What personalities fit these roles? What skills and knowledge do they need? What are the necessary preconditions for their efforts to be effective? Although assistance from outsiders might be helpful in processes of organisational change, we feel that the key persons should be the staff members of the organisation. They know the organisation from 'within'. They can follow the change process closely and, from their knowledge and insight, guide the process.

Facilitators of change can be found in any layer of the organisation: from top management to lower-level staff. In some organisations, change processes are introduced by one or more staff members who feel that changes in their organisation to address gender gaps are necessary. In others, management gives some staff a special mandate to play a role in gender-related change. One person could be the initiator of discussions about gender in the organisation, but more people will be needed to keep the process going. An initiator therefore needs allies who work together for change. Depending on the organisation's situation, this group can meet, discuss, and act openly or has to operate carefully not to disturb relationships and the working environment.

Facilitators of change processes need certain technical skills. They should know, for instance, how to make an organisational diagnosis or how to monitor change. Critical to the change processes is the nature of relations amongst the various actors involved. A facilitator of change processes, therefore, should have the social skills to build and maintain workable/good relations with a variety of people in order to get the work done and to reach the desired change. It is these social skills that we focus on in Part 3.

In our training courses, we have worked with men and women who felt that changes in gender roles and relations were required in their organisations. They generally held positions in the middle-level tier of organisations. Some had a formal responsibility to address gender issues, most did not. Even those who were expected to work on gender issues were not expected to expand their work to internal gender gaps within the organisation. Most participants paid attention to gender and organisational change in addition to fulfilling their other job obligations. For them, we developed materials and exercises to strengthen their understanding, knowledge, and skills and to keep up their motivation and enthusiasm. In this part we share these topics and exercises with others. In our training courses, we always started from the existing experiences, skills, and knowledge of the participants, gradually increasing their resources ('filling a backpack') to continue their journey towards building gender-friendly organisations. We have used the wealth of experiences from others to develop our training package, drawing from a variety of literature from communication science to organisational change, as indicated in the text or under 'Further reading'.

Part 3 is divided into four sections dealing with key areas of knowledge related to the initiation and facilitation of organisational change for gender equity. Section 1 describes the role of a facilitator/change agent and the skills and knowledge required for this role. In Section 2 we pay attention to communication. Section 3 is labelled 'influencing' – addressing resistance and power, using tactics to get others on your side, and so on. In the last section, 4, the significance of building alliances is stressed, describing how to create a support group within the organisation and how to network with people outside for effective results.

Section 1: The Facilitator/Change Agent and Her/His Role in Gender-related Organisational Change

Required skills: 'the sheep with the five legs'

Processes of planned organisational change need facilitators: people who guide the process. They play a number of roles in this process, moving from analyst, initiator, or catalyst, to designer and organiser, motivator and counsellor, then coordinator and evaluator. Many skills are required to play these roles – too many, perhaps, for one person (hence the comparison with the sheep with five legs). Some of these skills are of a technical nature. They require a knowledge and understanding of the process of change and how to manage such a process. Referring to the steps in planned change (see Part 2, Section 3), we can reiterate the diagnostic process (for instance, through a SWOT analysis); the identification of gender gaps and formulation of clear objectives; development of strategies, plans, and a monitoring system; design of evaluation criteria; and so on. These skills can be learned and, through experience, adapted to fit the context and their own personalities.

In all these steps, other staff or external persons are involved directly or indirectly. How they are approached is critical to the whole process of change. A facilitator/change agent, therefore, also needs social and even psychological skills to deal with people who may hold different beliefs and values, to be sensitive to their feelings, to recognise resistance and motivation, to encourage others, to stimulate group action, to promote participatory decision-making, to deal with conflict, and so on. She/he also needs to have the respect of others, in order to act in the role of leader in the process. It is the building and maintenance of good relations with people in and outside the organisation that is essential to keep the change process going and to reach the aims set.

Thus, such a five-legged facilitator/change agent has many personal qualities: perseverance/determination, a vision for change, courage, receptivity, orderliness, empathy, flexibility, self-confidence, self-consciousness, strength, and a tough skin to bear the criticism. Some individuals have these qualities by nature, but fortunately others can develop a lot of qualities through learning and practice. Most important is heartfelt enthusiasm and commitment to changing gender roles and relations.

The facilitator/change agent: a she or a he?

Very often women are supposed to be interested in gender issues and to undertake activities to reduce gender gaps. On the other hand, men are assumed not to take interest in gender and not to be willing to address gender issues. Our experiences differ from this stereotyping. Not all women show interest in or awareness of gender issues or commitment to gender-related change. We have met men interested in gender and in taking an active stand to change roles and relations; in fact, some are excellent facilitators in organisational change processes regarding gender.

We feel that the sex of a facilitator/change agent in gender-related change processes is not the most important factor. Of critical importance is her or his personality and ability to build relationships with other staff – men and women. Another factor that matters is the organisation's situation in terms of gender, for instance, the number of female staff relative to male staff, the extent of gender-friendliness of the organisational culture, the positions women hold in the organisational structure, and the gender sensitivity of development

programmes. In an organisation with many male staff members, a male facilitator/change agent might be more effective than a woman. We also believe that change processes regarding gender are much more feasible when both men and women play supportive roles to the facilitators/change agents. Both have their roles to play in the different steps and in the process.

Important resources

Important resources of facilitators/change agents are time and money. Change is usually a time-consuming process in which costs are involved. The expenses of training are obvious, but there are also costs in terms of the time of facilitators and other staff who, for instance, need to meet and discuss frequently. These can be planned, and are best done with the support of management. It will be easier to arrange for these resources if facilitating staff members have been given the authority or assigned tasks by the management.

Position and other sources of power of facilitators/change agents

In the introduction to this part we referred to the position of a facilitator/change agent in her/his organisation, stating that it could vary from top to lower level. Options and limitations to initiating and guiding change differ accordingly, since power or control over resources and processes is closely related to positions people hold. People in a higher position can allocate financial and human resources more easily than staff in lower positions. They can take part in brainstorming and decision-making meetings and staff at other levels have less access to these. Facilitators/change agents who occupy positions at lower levels of the organisation will need other power bases to bring about changes effectively.

Power is not based on position only. A person could influence other individuals' behaviour or thinking through her/his pleasant personality and enthusiastic and convincing way of talking about gender or leadership skills. We call this personal strength or 'power within'. Such characteristics may be even more important for creating willingness or to get active support of staff members towards gender-related changes or to change values, attitudes, and beliefs of others than power based on position. Changes in organisations initiated by managers might be considered forced or ordered from above without really changing attitudes or beliefs about gender roles. Facilitators/change agents at middle level have the advantage of being trusted by staff members at both higher and at lower levels. This trust is necessary to encourage people to open up to reveal their ideas, feelings, and beliefs about the conditions and positions of male and female staff and to get them involved in processes of change. For lower level staff, facilitator/change agent roles may be more difficult. Whatever the facilitator/change agent's position, building alliances with other staff is a must for creating a sufficient power base to realise the desired change (see further Part 3 - Section 4). We call this 'power with': strength through collective action.

In Box 10 we have summarised forms of power. 'Power within' and 'power with', 'power over' and 'power to' is distinguished. If we define power as the capacity to influence behaviour it means that power can be used in a negative and in a positive way. To what extent power use is considered positive or negative will depend on the perspective of the one who tries to influence and the perspective of the one subject to power.

Box 10: Power concepts¹⁰

Power is the capacity to influence the behaviour of other people.

The outcome of this influencing process can be:

- that the other agrees, accepts, does what you want him/her to do or believe,
- that the other resists, does not agree or accept or does what you want him/her to do or believe,
- that the other complies: says or pretends 'yes' but does not do it.

Sources of power are:

- experiences, expertise, skills,
- intellectual knowledge,
- resources (money, materials, information),
- control over resources,
- personal qualities or attributes: charisma, friendliness, humility, vision, helpful, and so on,
- physical strength or body language,
- relationships: networks, connections, links with others,
- formal authority: position, giving ability to reward or punish,
- ability to articulate, verbal skills, and
- emotional power.

Forms of power are as follow.

(Note: positive or negative use depends on the perspective of the user or the recipient.)

Power over: force to make another (group) do something because he/she has less power.

Positive use (according to the perspective of the user!) struggle of farmers against landlords, women's organisation acting against wife beaters.

Negative use: repression, rape

Power to: enabling an individual or group to do something

Positive use: capacity building, feed a family, solve problems/conflicts

Negative use: if misused by the 'power user'

Power with: strength due to collective action, mass

Positive use: group action for a common cause

Negative use: group action harming others, hooligans

Power within: individual strength, confidence

Positive use: healing action by a traditional healer (white magic)

Negative use: harming action by a traditional healer (black magic).

¹⁰ Based on De Beuk (1994).

Building and maintaining relations

A facilitator/change agent builds and maintains relationships in varying degrees with different groups of people, mostly within the organisation. Close relations exist with 'allies', who, together with the facilitator/change agent, are the key people in the process of change. Frequent contacts may be necessary with influential staff members who have to be approached during the change process due to their position, tasks, responsibilities, or mandate. A last, variable group is other staff who can be considered the 'constituency' of the facilitator/change agent and her/his allies.

It would be too ideal to expect that these interaction processes will be without any conflict. Indeed, there are always tensions between and among people. It can take some time before conflicts come into the open, usually they build up gradually. Conflicts can arise because material things to be shared are limited, or due to organisational unclarity, because of lack of recognition, affection, respect or authority, and so on. Differences in traditions and values can also be sources of conflict. Chosen roles and processes of inclusion/exclusion can give rise to conflicts as well. They touch on somebody's identity. For instance, one can be excluded from others because of gender, ethnicity, class, professional level, and so on. It is important to realise that tensions are perceived, for instance, some may feel they are excluded, while others do not perceive it as such.

The way tensions are perceived and expressed depends to a large extent on personal and cultural characteristics. Due to their gender roles and identities, women and men may perceive conflicts differently and, consequently, react in other ways. Take, for instance, the rejection of somebody's proposal in a meeting. Some women tend to withdraw or become submissive, other start to scold. They may hide their emotions, which build up though until the moment comes when they break loose. Men may feel hurt when their proposal is rejected, because their self-esteem is touched: their ideas are attacked. They start to argue, take up the fight, and try to win.

Facilitators/change agents have to be aware of conflicts and be able to manage them. Tensions are inherent to processes of change because these processes hold all sources of conflict mentioned. (See also Part 2 - Section 3 on resistance.) They should try to 'sense' hidden tensions to avoid eruptions, because at that stage they could be easier to manage. Conflicts, however, are not necessarily bad. Sometimes tensions could clarify situations and give openings to continue processes in a better manner. Conflict management is not easy. Having an emotional and a rational level makes it even more complicated. Ways of dealing with conflicts are to a great extent specific to the national and organisational culture. In some cultures conflicts are discussed openly, in others they are covered and dealt with privately. The issue at stake and the people involved may also matter: does it concern a sensitive issue, is the boss involved, is the boss male or female, and so on. Therefore, it is difficult to give general guidelines about conflict management; moreover, an approach preferred by one person does not necessarily fit the personality of another. In Box 11 a few tips are given.

Box 11: A few tips for managing conflicts¹¹

- Find out what happened at the rational level: the 'facts' and at the emotional level: the feelings.
- Try to find out why people react as they do, not necessarily asking directly, but indirectly discussing the situation.
- Give attention to people involved in the conflict. Listen to them and, if necessary, give room to 'blow off steam'.
- Analyse the conflict: What is the central conflict issue, which is the immediate reason for the conflict? What are 'side' but related issues that played a role in building up the conflict? Who are the key players and how do they behave towards the conflict? Be aware of differences according to gender.
- Identify the type of conflict: is it about means, values, identity?
- Decide upon certain solutions fitting the type of conflict: avoiding, accommodating, competing, compromising, and collaboration are all ways of dealing with conflicts. For instance, in a conflict about values a solution may lie in convincing the other; or leaving the issue for a while trying to find common ground; or agreeing to disagree. Conflicts about identity will take time to solve because it comes to fundamental attitudes and beliefs of and within the organisation – see also Part 3 - Section 3.

On the facilitator and the process

- Do not let yourself be pushed away, for instance, do not react aggressively towards an aggressive person and do not defend yourself against arrogant behaviour.
- Use active listening to improve understanding and generate trust.
- Use assertiveness skills to make a strong impact on others and to maintain commitment.
- Reduce communication blockages between the parties involved.
- Be aware of personal feelings such as irritation. Separate them from the real issue.
- Concentrate on issues.
- Make clear what actions have been decided upon.

A lone pioneer or a popular leader?

Facilitating processes aiming to change gender roles and relations is far from being a smooth journey. Men and, probably even more, women, who critically discuss the status quo in their organisation and express the wish to change certain aspects are often not liked. Changes affect power relations and many people will – consciously or unconsciously – perceive their power bases to be threatened. Especially in the beginning a facilitator/change agent will feel like a pioneer taking risks alone. As a reaction she/he may frantically search for like-minded people, even to the extent of trying to become well liked by everyone. Building good relations with other staff is not only a means to achieve changes, but also a way of surviving – it is only very tough skinned individuals who are able to continue while being disliked or the subject of jokes or even less pleasant things. The facilitator/change agent's challenge is to find a balance between carefully manoeuvring towards change and acting out of fear of becoming unpopular. Some colleagues become real friends, others will appear only as 'temporary' fellow travellers who disengage from the process when it becomes uncomfortable for them. With other

¹¹ Based on De Beuk (1994).

persons relationships will always remain tense and complicated. Facilitating means keeping the back straight and continuing on, while still smiling, if possible. It could be that a change process requires different personalities at different stages of the process: a pioneer who critically considers the status quo may open the door for others who are willing to take risks while carefully building her/his support base. Later on in the process, a more diplomatic and flexible person may take the lead.

Much will depend on the situation in the organisation: to what extent are gender issues under discussion? Do some women and/or men feel dissatisfied with the situation? Referring to Table 2 we can distinguish different phases regarding gender awareness and commitment in organisations. These phases show typical reactions of management as well as other staff. Macdonald et al. have related these gender situations and reactions to the type of facilitator/change agent and his/her strategies into a possible typology (see Table 3). All three types are said to be necessary and valuable contributors, at different moments, to the process of change regarding gender, while their responses and personality types may exist alongside each other.

Table 4: Typical models and responses in processes of organisational change

Situation regarding gender in the organisation	Typical response of management/ dominant group	Typical response of other employees/ subdominant group	Typical model of facilitator	Typical strategies of facilitators
Gendered organisation	Defensive; easily accused; insulated by power.	Passive; lacks awareness	The lone pioneer: frequently stigmatised; feels victimised; sometimes like a frozen rabbit; needs support base.	Putting gender on the agenda by explaining; giving facts and figures; formal/informal organising.
Gender-aware organisation	Feels attacked, intimidated; sometimes overly impressed and eager to be 'politically correct'	Increasingly aware but afraid to rock the boat; others who feel threatened by change turn the facilitator into a lightning rod.	The fighter: charismatic, fast moving; risk taker; not afraid of conflict; has a small support base in the organisation.	Use arguments based on ideology and values; form strategic alliances (inside and outside the organisation).
Gender-sensitive organisation	Cares about the organisational gender image; is interested in making alliances with facilitators; needs support in policy development and implementation.	Prepared to support management; in need of skills and tools to bring policies into practice.	The player: tries to 'play' the organisation; recognises opportunities; negotiates; is diplomatic, flexible.	Building planning, monitoring and evaluation systems; mechanism for learning and accountability; promotion of innovative practices; outside networking.

FURTHER READING

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In the following exercises we dig a bit deeper in the personal characteristics of facilitators in processes of organisational change regarding gender.

EXERCISES: ROLES OF FACILITATORS/CHANGE AGENTS IN GENDER-RELATED ORGANISATIONAL CHANGE

A. Participants' role in change processes within their own organisation

Aim of the exercise: to increase insight into one's role in processes of change in the own organisation and to assess further needs to improve her/his performance.

Time: 40 minutes

Method: individual reflection directed by questions; needs assessment

Materials: pen, paper, whiteboard-optional: cards, markers

Steps

1. Explain the exercise by relating it to roles of facilitators/change agents. Some participants may be facilitators, others not, therefore in this exercise any process of change can be considered. Ask each participant:
 - a. to reflect on her/his role in processes of change – focused on gender or more general - that have taken place or take place in the organisation: in what activities did/does she/he take part, what role did/does she/he play?
 - b. to assess whether the activities undertaken and/or the approach used:
 - * is good to continue
 - * should be improved
 - * should never be done/used again; and
 - c. based on her/his experiences, to list needs to improve on facilitators' skills.
2. Discuss in the plenary the outcomes of the reflection and discuss the roles of staff members or facilitators in processes of change. List the needs of the participants on a whiteboard to identify issues to be further addressed in the training.

Variation

Instead of asking participants to mention needs they can be requested to write needs on cards to be put on a whiteboard or wall. This might be less threatening since it is anonymous.

B. Facilitator/change agent's role in their own organisation

Aim of the exercise: to increase insight in the way their own organisation addresses gender issues and their (possible) role in changing their own organisation for gender equality.

Time: 45 minutes

Method: drawing; discussion

Materials: pen, paper, flipcharts, markers, wall

Steps

1. Ask each participant to make a drawing of the gender situation in their own organisation, in which it is expressed how she/he feels about the possibilities for change.
2. Put the flipcharts on the wall and discuss at random various drawings: their meaning, the feelings about possibilities for change and a (possible) role of the participant as facilitator. Discuss which factors may affect the outcome of change—such as resources, personal skills, certain internal and external factors. List them on a flipchart – they could be useful in discussions later on in the training.

C. The participant's position

Aim of the exercise: to better understand one's position in the organisation and how this position positively and negatively affects facilitation of change processes regarding gender.

Time: 40 minutes

Method: drawing, discussion

Materials: pen, paper, flipcharts, markers, wall

Steps

1. Ask each participant to use a flipchart to draw or indicate in an organogram her/his position in the organisation. Ask them to indicate the number of people with whom she/he has vertical and horizontal relations (it tells something about the size of the organisation).
2. Put the flipcharts on a wall. Discuss observations, for instance, similarities and differences in positions and number of people they have relations with. Discuss the advantages and disadvantages of being a facilitator holding certain positions.

D. Personal qualities

(Ofman 1993)

Aim of the exercise: to increase insight into one's own qualities and those of others to be able to better deal with interaction processes that frequently take place during organisational change regarding gender.

Time: 45 minutes

Method: individual reflection directed by questions

Materials: pen, paper, whiteboard, handout of exercise D (short version of core quadrants of Kern Konsult)

Steps

1. Explain and discuss about core quadrants and how using the quadrants can, firstly, help to get to know yourself better and, secondly, to better deal with other people

- one has to work with in processes of change regarding gender, by trying to identify their core qualities and core quadrants
2. Ask each participant to make her or his core quadrant, if necessary with the help of another participant.
 3. Next, let the participant think about a colleague who she/he has to approach to get things done but who she/he finds difficult. It could be, for instance, a person whose permission is needed to initiate a change related to gender. Ask to make a core quadrant of this person.
 4. Discuss the exercise in the plenary. Was it difficult? Were they surprised about the outcomes concerning themselves and their 'difficult' colleagues. How do they think that making core quadrants can help them in the preparation and implementation of organisational change processes regarding gender?

E. Increasing personal strength

Aim of the exercise: to strengthen the participant's capacity as facilitator/change agent.

Time: 60 minutes

Method: discussion, role-play.

Materials: whiteboard

Steps

1. Ask the participants about difficult situations they faced because others made fun of their gender role or criticised them for being involved in gender issues. Ask them how they reacted.
2. Form small groups and ask to discuss how they should deal with the following comments of staff members – as a man or as a woman.
 - a. When you as a man want to discuss in a meeting the importance of paying attention to women farmers in a training course or programme and colleagues react with a lot of unpleasant laughter: 'Oh there is Mr Gender wanting to discuss his women!'
 - b. When you as a woman involved in gender issues find some unpleasantly laughing and joking men at the door of your office: 'And what is this lady plotting today?'

Ask them to do a role-play illustrating their 'answer'.

3. Look at the role plays and discuss the outcomes in a plenary session.

F. Dealing with conflicts

Aim of the exercise: to increase one's understanding of conflict management.

Time: 60 - 90 minutes

Method: personal reflection; discussion

Materials: pen, paper, whiteboard

Steps

1. Discuss conflict management.
2. Ask each participant to think about a conflict they have experienced and to make notes about the following questions.
 - a. How did the conflict become 'visible'?
 - b. Who were players or parties in the conflict?
 - c. What caused the conflict?
 - d. How can the conflict be identified: as one about means, values or identities?
 - e. Was the conflict solved, how?
 - f. To what extent did gender play a role?
3. Ask them to discuss their experiences in a small group:
 - a. to identify common elements in the conflict situations (2a – f), and
 - b. to assess the ways of conflict management. Could they suggest alternatives?
4. Discuss in plenary the outcomes of the groups and the different alternatives for managing conflicts. Point to possible cultural and personal (gender-related?) differences in conflict management.

HANDOUTS TO PART 3 SECTION 1

Handout of exercise D: Background on core qualities – a shortened version of D. Ofman (1993) Inspiration and Quality in Organisations , pp. 33, 91

Every person is 'coloured' by so-called core qualities, i.e., attributes that form part of a person's essence (core). They are somebody's strong points, the characteristic that immediately comes to mind when we think of a person. They can be recognised as a person's special qualities, about which they themselves will say that 'everybody can do that'. Examples of core qualities are determination, empathy, consideration for others, precision, flexibility, courage, and so on. Core qualities are always potentially present. They are not so much characteristics as possibilities that can be 'tuned into'.

To every core quality there is a distortion, a result of an overdeveloped core quality, a 'too much of a good thing'. We call this a pitfall, which is inextricably bound to the core quality. For instance, the pitfall of the core quality flexibility is inconsistency: flexibility is overdeveloped and turned into a weakness instead of a strength. This pitfall is a label the person is often given by others. If you do not know your core quality/qualities, there is one way to discover it/them, and that is by asking yourself what people often reproach you for, in the sense of: 'Don't be such a' or Don't be so...'. Then ask yourself of what positive quality this is an excess and you have one of your core qualities.

Besides a pitfall, a person's core quality also comes with a 'challenge' The core quality and the challenge are complementary qualities. In our example of flexibility, its challenge is orderliness. Striking the right balance is the point, but the problem is often to be able to see how the two qualities can be combined. The challenge is the positive opposite of the pitfall. Inconsistency is no longer a problem for someone who is flexible in an orderly way.

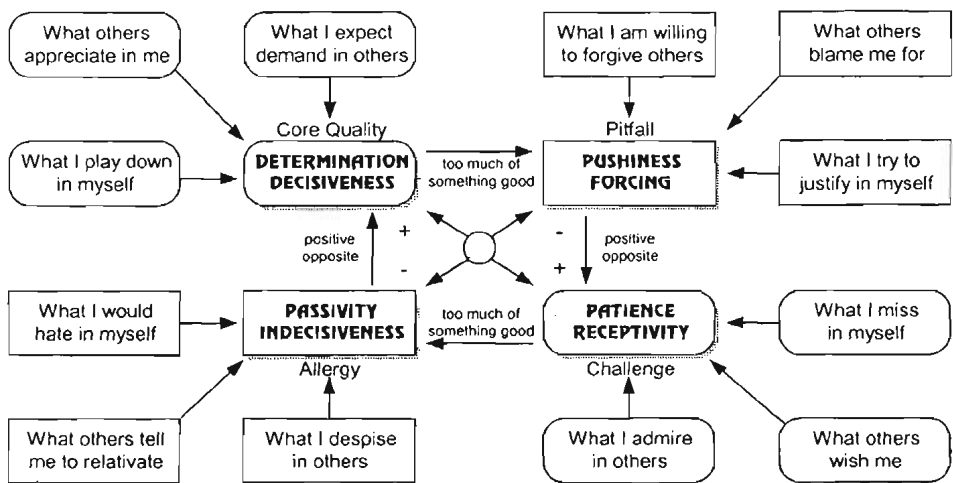
The average person appears to be allergic to an excess of his or her challenge, particularly if personified in someone else. The more another confronts you with your own allergy, the greater your chance of falling into your pitfall. The allergy of somebody with a high degree of flexibility, for instance, is rigidity and the more rigidity one meets in another person the higher the chance to do 'too much of a good thing': to become inconsistent. Formulating the allergy completes the core quadrant. Core quadrants can be constructed from any of the four angles and checked in various ways.

In what sense can it be useful to us to be aware of our core quadrants? They are useful for self-examination and the clearer we are the more consciously we can try to deal with them in our work. Pitfalls and challenges are usually the sources of conflicts a person has with his or her environment. Disdain is characteristic of situations in which people are confronted with their allergies. To get to our example core quality, flexibility; the core quadrant makes it clear that a flexible person will have great difficulty recognising 'order' in someone else as a positive quality. He/she will tend to disqualify it by labelling it as 'rigidity' because he/she cannot imagine order and flexibility as complementary to one another, neither in him/herself nor in others. Likewise, orderly people will find it difficult to appreciate flexibility in someone else, because they will immediately want to label it as 'inconsistent or chaotic'.

Conflicts, irritations, and mutual tensions are often born of blindness to one's own qualities (and their distortions) and those of others. If two similar characters meet, for instance, it is not hard to imagine that they may not have an easy time together. There is a great risk such a meeting will turn into a confrontation. The difference in confrontations between similar and contrasting characters is that he or she will respect the 'similar' other, which is not the case for his or her opposite.

Some examples of core quadrants are presented below.

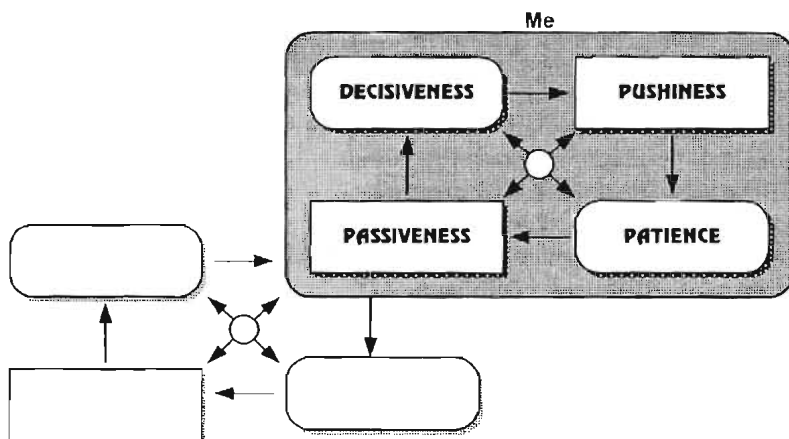




2.8 The Double Quadrant

Core quadrants are very useful for self-examination. They are also very helpful for managers when preparing for job evaluations with employees. Confronting someone to whom you are allergic can be productive in two ways. By realising that your allergy could have something to do with your own challenge, you become calmer, more tolerant and your self-knowledge increases. And you can identify the other person's core quality through your own allergy (which is the other's pitfall) by means of a double core quadrant.

Let's say a manager is aggravated by someone he thinks is passive. Precisely because he is allergic to this, he decides to first reflect and determine what this says about himself. He draws a core quadrant of himself on the basis of his allergy, for example the following.



Section 2: Facilitator/Change Agent's Skills - Communication Processes

We have seen that facilitators/change agents for organisational change regarding gender need many qualities and skills. Here we pay attention to communication skills, since proper communication is the key to building and maintaining relationships with a variety of people and to understanding what others say, think, and feel.

Types of communication

In books about communication we can find definitions of 'communication', using the terms 'sender', 'receiver', 'message', 'channel'.

Our dictionary

Communication refers to the process in which somebody (the 'sender') transfers knowledge, experiences, orders, ideas, feelings, and so on (the 'message') to another person (the 'receiver') through a specific medium ('channel'), often with a certain intention.

Messages can be sent verbally, in writing, using pictures, and the like. Communication can take place through direct personal contact but also, more at a distance, through telephone, e-mail, and so on. Very important are the non-verbal messages or signals senders and receivers send to each other, something about which we are mostly unaware. Body language is an example of non-verbal communication. Somebody's posture, the way a mouth is set, keeping eye contact, a meek or harsh tone, the speed of talking, are in themselves messages: they tell – often unconsciously – something about our feelings or maybe even our values towards another or about an issue. Verbal communication should be supported by non-verbal signals to be effective. For a woman who talks with a colleague to convince her to sign a petition it may be most effective to use sympathetic gestures, to show a smiling face, and to be interested in the reactions of her colleague.

About wavelengths

The wavelength for sending and receiving has to be the same for the receiver to get the message. The sender has to make efforts to find out if the receiver has understood the message in the way it was intended: what was the reaction or feedback? It has appeared that men and women in their home, working environment, and in public places use other ways of expressing themselves and interpreting what is said. Women, for instance, have more than men the tendency to apologise 'I am sorry' or to thank, even for nothing. Depending on the cultural background men and women may interpret these expressions in different ways, for instance, as submissive or as being supportive to the case. They show behaviour accordingly, such as irritation, happiness somebody is with her/him, or for such a friendly style. Words, behaviour, clothes men and women wear—all send out messages, but the interpretation of the 'receiver' may differ completely from the intention of that of the man or woman concerned. In other words, a facilitator in planned change processes on gender has to be conscious about many things when communicating with others!

Listening and asking are two sides of the same coin in direct communication with others. Box 12 shows some simple overviews and questions to assess personal behaviour in communication.

Unblocking your thinking: Personal skills © Ian MacKay, October 1991

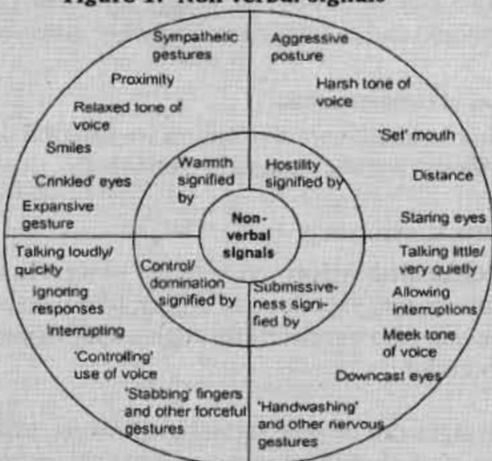
Ian MacKay

Listening

- At what level currently do you rate your skill as a listener?
 - Much above average?
 - Average?
 - Or even below average?
- How would others rate your skill at listening?
 - Your colleagues?
 - Your family/friends?
 - Your staff?

How do you know?
- Often do you:
 - switch off when you are not interested in the subject?
 - wait impatiently to cut in, or even interrupt, with your own ideas?
 - find yourself mentally criticising/resenting the speaker?
 - feel distracted or irritated by the speaker's 'style' (use of words/ phrases, accent, mannerisms)?
 - allow your preconceptions or prejudices to influence your understanding of what a person says?
 - pay as much, or more, attention to your surroundings as to the speaker?
- Are you aware of what the speaker is not saying, of how he/she feels about the conversation? In other words, are you 'reading between the lines' by interpreting his/her body language? Fig. 1 (right) illustrates a range of non-verbal signals.
- Is the speaker conscious of your interest? Or lack of it? How can he/she tell how committed you are to the discussion? Two skills essential to effective listening are physical and psychological attending, summarised in Fig 2.
- Having reflected on your answers to questions 3, 4, and 5 would you like now to revise your estimate of your current skill at listening?
- How important is it for you to really listen as part of your job?
 - How much time each week do you spend listening
 - to those above you?

Figure 1: Non-verbal signals



- to your staff?
 - in informal meetings?
 - in committees?
 - in choosing staff?
 - in appraisal discussions?
 - in disciplinary interviews?
 - in other situations?
- What are the results; consequences of how well you listen?
- Could the level of your skill at listening represent an unnecessary blockage on your thinking, and performance, at the moment?
 - If you were to improve your listening skills, what would be the result:
 - for your view of yourself and other's views of you?
 - for your decision-making process?
 - for the problems you will face today? Next month? Next year?
 - Is your current knowledge of listening skills adequate? How can you be sure?
 - What could/should you do to improve your listening skills? Those of your staff? When will you take action?

Figure 2: Two skills essential to effective listening

Physically attending which involves

LOOKING INTERESTED	
Facing the speaker	Leaning slightly towards the speaker
Maintaining eye contact	Staying relatively relaxed
Keeping an open posture	

and Psychologically attending

BEING INTERESTED	
Listening to what is being said by:	Listening to how it is being said by:
Keeping an open mind	Interpreting the person's tone of voice
Thinking ahead	Evaluating the non-verbal signals
Analysing and evaluating the message	Listening to what is not being said by:
Getting the full story	Listening 'between the lines'
Not interrupting	Searching for possible gaps in your understanding
Not talking for more than about a quarter of the time	Asking the right questions

Asking questions

- Are you satisfied that you invariably employ the right questions to good effect? Or could your question technique be improved?
- How familiar are you with the different types of question open to you? And when to use them?
 - How often does the question you ask fail to produce the information you were seeking?
 - Could you improve on this?

- Are you conscious of the way you phrase questions? Do you need to be?
13. To what extent is asking questions a part of your job? How much depends on the information you obtain from using this skill?
14. What would be the repercussions of poor questioning in terms of:
- basing decisions on inadequate information?
 - upsetting people?
 - recruiting square pegs for round holes?
 - failing to recruit potential highfliers by creating the wrong impression?
 - failing to identify problem areas?
 - other undesirable results?
15. Could the level of your skill at asking question also represent an unnecessary blockage on your thinking, and performance, at the moment?
16. What action could/should you take to improve your skill at asking questions? When will you take such action?

Being assertive

17. How do you react in your dealings with people generally? and at work?
- Aggressively?
 - Submissively?
 - Assertively?
18. Are you aware of the attitudes and belief,, underlying these three types of behaviour? For instance, what is your understanding of the distinction between aggressive behaviour and assertive behaviour?
19. Having given some thought to questions 17 and 18, how often are you either aggressive or submissive rather than assertive?
- Do you make decisions for others or allow others to make decisions for you?
 - Do you often get emotionally 'hooked', reacting with fear/anxiety or anger, in your dealings with others? Or do you invariably behave in an adult way?
 - Do you believe that either verbal bullying or passive submission during a discussion can help you to achieve what you want? In the short term? In the long term?
 - To what extent do you assume responsibility for your own behaviour?
 - What is your attitude to Your own mistakes? To those of others?
 - Do you shift the blame onto others whenever possible?
 - Do you expect perfection from yourself and others?
 - Do you recognise that you may make mistakes, and accept responsibility for

them?

- Are you reactive, waiting for others to take action, or proactive initiating action yourself?
 - How would others answer the above questions about you?
 - Your family and friends?
 - Your staff?
 - Your colleagues?
 - Your superiors
20. Having reflected on your answers to question 19, would you now revise your answer to question 17?
21. To what extent does your behaviour vary according to who you are with?
- Your boss?
 - Your colleagues
 - Your staff
- What does this say about you?
22. Are you sure that your behaviour is not unnecessarily blocking or diminishing the impact you could be having at all levels at work?
- Could changes in your behaviour produce beneficial changes in that of others?
 - In what practical ways could this help you and others?
23. What could/should you do to improve your assertiveness level at work?

Checklists for Human Resource Development

(hardback) by Ian MacKay is available from Gower Publishing, Gower House, Croft Road, Aldershot, Hants GU11 3HR. Address queries regarding the Unblocking Your Thinking series to Philip Worsfold, University of Wales, 67 Park Place, Cardiff CF1 3AP

Figure 3: Types of questions open to you

Question type	Purpose	Question form	Illustration
OPEN	To explore broad background info.	General	'Please tell me about....?'
	To explore opinions attitudes	Opinion-seeking	'What do you think about.....?'
		Trailer	Making a broad comment on a subject, pausing in anticipation of a response
PROBE	To show interest encouragement	Non-verbal noises	'Hmm?' 'Ah?' 'Oh' allied to head nods etc
		Supportive statements	'I see....?' 'and then....?'
		Key word repetition	Repetition of one or two key words to encourage further response
	To seek further information	The pause	
		Simple interrogative	'Why?' 'Why not?'
		Extension	'How do you mean?'
CLOSED	To explore in detail opinions attitudes	Opinion-investigating	'To what extent do you feel that....?'
		The reflection	'It seems to you that....?' 'You feel that....?'
		Yes/No response	'Are you....?' 'Have you....?'
	To establish specific facts information	Identification of person, time, number, etc.	'How long did that job take?' 'When did that happen?'

About communication methods

There are a number of communication methods and channels to be found in general communication literature. We limit ourselves to some comments relevant to our topic of organisational change regarding gender. The choice of method will to a great extent depend on the aim of communication, the type of 'message' somebody wants to send, the characteristics of the receiver(s), the nature of the relationship between the sender and receiver(s), past experiences between them, and the context in which it occurs.

It cannot be stressed enough that, in planned processes of change, the facilitator should be clear about what she or he wants to achieve in the communication process: is it to inform others? convince somebody to do something? get ideas from other people? build trust? and so on? Some aims fit a brainstorming session to get as many ideas on the table as possible, other aims better suit a discussion in which clear arguments and opinions are being exchanged.

The communication methods depend on the aim but also on the receiver's knowledge, opinion, feelings, and behaviour. What does he or she know about it and think about it? What does he or she feel about it? What does he or she do about it? What is the degree of resistance or motivation? (See Part 2, Section 3.) For example, a man can say that he is very gender sensitive, but what does he mean by that? After probing he may say that he exchanges friendly words with the female staff, asking them about the children, home, and the like. He does not talk about the work and work environment. It appears that he would not like women to reach higher positions. A facilitator of organisational change processes has to choose her or his method of communication to fit the level of understanding and feelings of this colleague in order to establish a good relationship and not to repel the person. In some cases the facilitator will choose a bilateral encounter, in others it is impossible because of difference in position, sex, and so on. In other situations group meetings, mixed or with male or female staff only, are to be preferred. One has to know the receiver but also the audience: how will other staff and close colleagues take bilateral meetings with the boss? Will some men feel excluded if they are not invited to a women's meeting?

The process of communication involves the message and the 'packing' of the message. When it concerns gender maybe more attention has to be paid to this 'packing' because the sender wants the receiver to accept it, open it, and read the content. Apart from the written content non-verbal signals could be decisive: a feminist sign on an announcement may attract some people, but repulse others.

A lot about communication can be learned but facilitators will often prefer certain methods based on their personal qualities and capacities. Some like more informal communication methods, others may opt for formal ways because it better fits their way of doing things and of building relationships with others. Insight in the own core quadrant – see Part 3, Exercise D - can help to identify personal strengths and pitfalls.

A last, but not unimportant, comment on communication concerns timing. The effectiveness of communication is influenced by the moment chosen to give information, to organise a meeting, and the like. If people's minds are too occupied with other matters it will be difficult to get their attention for your message.

With the following exercises we aim to increase facilitator/change agents' awareness and insight regarding essential elements of the communication process as discussed above.

FURTHER READING

- MacKay, I. (1989) *35 Checklists for Human Resource Development*. Hampshire, UK: Gower Publishing Limited
- Robbins, S.P. (1997) *Essentials of Organizational Behavior*. New Jersey: Prentice Hall, Inc
- Senge, P.M.; Roberts, C.; Ross, R.B.; Smith, B.J.; Kleiner, A. (1994) *The Fifth Discipline Fieldbook. Strategies and Tools for Building a Learning Organization*. London: Nicholas Brealey Publishing.
- Tannen, D. (1995) *Talking from 9 to 5. Women and Men at Work: Language, Sex and Power*. NY: Avon Books

EXERCISES: FACILITATORS' SKILLS - COMMUNICATION

G. The importance of communication

Aim of the exercise: to increase awareness about the importance of verbal communication

Time: 25 minutes

Method: game

Materials: pen, paper, cards

Steps

1. Prepare the game in advance: invent a word with the same number of letters as there are participants. In the case of a large group, divide the group into smaller ones and make more words. Write each letter of the word on a card.
2. Explain the game to the participants: each participant draws a card and as a group they have to form a word without talking to each other.
3. After the words are formed, discuss the game. Was it difficult? Why? How did the group(s) come to a solution?

H. Verbal and non-verbal communication

Aim of the exercise: to increase awareness about verbal and non-verbal communication and how gender is related to the process of communication.

Time: 60 - 90 minutes

Method: role play

Materials: pen, paper, whiteboard, handout of exercise H (role play) hand out Box 12

Steps

1. Explain the background of the exercise by referring to the communication process, communication skills and how gender could influence the communication process. Give handout Box 12.
2. Explain the aim of the exercise. Ask the participants to perform a role play and give a handout of exercise H. Divide the roles and give the players time to prepare.
3. Form two groups of observers consisting of the participants left. One group has the task to observe non-verbal communication – body and face language, and so on. The other group should observe verbal communication – type of questions, tone, style of questioning. They can use handout Box 12.
4. After the performance discuss the role play. How did the players feel? Was the play a real life situation? What observations were made? Point to gender: did men and women act differently or were they approached differently? What about the criteria set?

I. Communication in a meeting

Aim of the exercise: to increase awareness about the process of communication with different personalities

Time: 60 - 90 minutes

Method: role-play

Materials: pen, paper, whiteboard, handout of exercise I (role-play), hand out Box 12

Steps

1. Explain the background of the exercise by referring to the communication process and the importance of approaching different personalities in different ways. Explain the aim of the exercise. Ask the participants to do a role play and give a handout of Exercise I. Divide the roles and give the players time to prepare.
2. Form three groups of observers consisting of the participants left. Ask one group to observe non-verbal communication – body and face language. Ask another group to observe verbal communication – what is said and how others react to it, tone, way of bringing forward points, ideas, opinions, and so on and ask the third group to observe who reacts on who, sequences of reactions, and why it happens like that. They can use handout Box 12.
3. After the performance discuss the role play. How did the players feel? Was the play a real life situation? Did it reflect dialogue or rather discussion? What observations were made related to the process of communication? What could be observed about the roles and behaviour of men and women? To what extent was the dialogue influenced by the potential sensitivity of the topic, being related to gender?

J. Women's and men's languages

Aim of the exercise: to increase awareness about difference in wording men and women may use to express themselves, differences in interpretation of the words and possible consequences concerning relations between male and female staff members.

Time: 60 minutes

Method: discussion in small groups and in plenary

Materials: pen, paper, whiteboard, handout of Exercise J ('Mixing Business and Non-business Talk')

Steps

1. Explain the relationship between gender and language and how it may affect communication processes. Ask if the participants know examples of misunderstanding or misinterpretation – funny or less funny situations. Give the handout of Exercise J to each participant and ask her/him to read it.
2. Form small discussion groups to exchange views on the article, more specifically:
 - a. to what extent do they recognise the situation described?

- b. what are consequences for female and male staff and the way they relate to each other?
- c. do they find the situation and the consequences desirable or acceptable? If not, what could be done to change the situation?

3. Discuss the major observations of the groups in the plenary.

HANDOUTS to Part 3, Section 2

Handout of exercise H – Part 3

Background to role play - To be given to all participants

About one year ago, a few men and women concerned about their organisation's situation regarding gender have formed a gender working group (GWG). Their aim is to increase awareness among staff about the different roles male and female staff have in the organisation and the different positions they hold. They feel that these differences are unacceptable and want to change the situation in the organisation.

Now they are looking for new members. They have decided to invite a few staff members to find out if they are interested in joining the GWG and to see if they fit the GWG. After meeting them they will select two people for the GWG. They got some names from other colleagues of different departments.

We will see two role plays in which two professional staff, one man and one woman, talk with two potential new members, one after the other. They know the invited staff members only 'by face'. One is a man working in the administrative department, the other a highly qualified professional woman. After the interviews, the GWG members will shortly discuss whether they would like one or the two or none in their GWG.

Background information for the two staff being interviewed – to be given to the person concerned only!

Characteristics of the man from the administrative department You are a bit shy. You have outspoken ideas about how relationships between men and women should be and how the organisation should deal with gender. The organisation should make it possible that men and women work together in a relaxed atmosphere. You also feel that support staff is not recognised enough in the organisation and especially not by professional staff.

Characteristics of the professional woman You are a highly qualified ambitious woman. You do not know much about gender. You feel flattered to be invited but you have your doubts about the GWG – being a member might damage your career possibilities.



Mr. Know-it-all

He poses to be the brightest and wisest of all who needs no further 'learning'.



Mr. Dictator

He talks every other member down and can be very authoritative and insistent on his ideas. He does not allow others to talk.



Mr. Politician

He tries to politicise every issue under discussion.



Mr. Disinterested

He is probably made a member of SLIC under duress or has come accidentally in the group. He does not evince much interest in the group deliberations.



Mr. Reasonable

He is genuinely interested in the agenda of the meeting and talks and reacts to others in a responsible and positive manner.



Mr. Wolf

He is cunning and tries to talk in a disguised manner to mislead the group for personal benefit.

Handout of Exercise I – Part 3

Background to the role play – to be given to all participants.

A staff member of a certain organisation is concerned about the condition and positions of women relative to men in the organisation. She/he feels that changes in this respect are required with his/her strong input. He or she (the participants can decide the sex of this 'facilitator') has formed a support group consisting of different staff members of the organisation. His/her choices are based on strategic considerations.

The group has met once and members know each other a bit better. We will see the second meeting of the group – a dialogue between the members about what might be the groups' dream of a gender-friendly organisation. The facilitator has proposed the topic for the dialogue.

Note that a **dialogue** differs from a discussion. A dialogue is an exploration of different perspectives, opinions, and ideas; a kind of brainstorming. It means that the members involved need to inquire about the topic by asking questions to each other, which lead to further elaboration. The participants must feel that others are interested in really knowing and understanding what one is trying to say or explain. Therefore, effective listening skills and open and probing questions should be used. The role of the chairperson is to create an atmosphere in which everybody can take part in the exchange and nobody feels prevented from talking.

The intention of a **discussion** is to come to some sort of closure: a decision, agreement, and so on. It means that all kinds of suggestions, ideas, and options are considered from different sides and, upon its consequences, compared and weighed. The role of the chairperson is to create an open atmosphere, but also to lead the discussion towards a conclusion/decision by structuring the discussion, clarifying, summarising, and concluding.

Below you find the six personalities of the different members described. The facilitator is Mr. Reasonable.

Handout of exercise J – Part 3: Mixing business and non-business talk

I was sitting in the waiting area of a car dealership while my car was being fixed. Gradually, I let the book I was reading fall to my lap, as I became engrossed in the friendly conversation taking place among three salesmen who had gathered around the coffeemaker that was placed in the same lounge where customers waited. They were exchanging humorous stories about having to work late and return home to disgruntled wives. They gossiped about how late another salesman worked and joked that it was a wonder his wife hadn't left him. Suddenly, I saw the sole woman who worked in sales in this dealership approaching the men. I thought, how nice, she's going to join them. I was eager to see how her entrance into the conversation would affect it. But it immediately became clear she was not going to join them. As soon as the men saw her approaching, the conversation stopped, and everyone went stiff. It was as if a chill had rippled through the air. She asked one of the men a question, got an answer, and went away. I have no way of knowing what accounted for the

particular relations between this woman and the men she worked with, but, regardless of the reasons, I could imagine how difficult it had been for her to break through that sheet of ice to ask her question. And I thought how much less pleasant it must be for her to go to work each day than for them.

Talk at work is not confined to talk about work. Many moments are spent in casual chat that establishes the friendly working environment that is the necessary backdrop to getting work done. It is easier to approach someone with a work-related issue if you are comfortable in each other's presence and the lines of communication are open. A major way such working relationships are established is through informal, nonwork talk. Both men and women engage in nonwork chat at work, but what they are likely to talk about, and how, are often different.

Many women mix business with talk about their personal lives and expect other women to do so too; they may see women who do not engage in personal chat as cold, aloof, or 'not a people person.' Men are more likely to mix business talk with banter about sports or politics. (Even though the car salesmen were talking about how their late hours affect their home lives, they were still in a way talking about work-the pressure of hours demanded by their jobs-and doing so in a humorous, joking tone.) Everyone can see the interest value of the type of small talk they themselves engage in, but they are likely to regard as 'trivial' the type of small talk they don't happen to enjoy. It's common to hear men complain about or mock women's interest in talking about clothes and personal details, and common to hear women complain about or mock men's interest in sports.

Both women and men know that their small talk is just that-'small' compared to the 'big' talk about work-but differences in small-talk habits can become very big when they get in the way of the easy day-to-day working relationships that make us feel comfortable at work and keep the lines of communication open for the big topics when they arise. A man who regularly finds himself left out of lively conversations about clothes or haircuts or family problems, or a woman who regularly finds herself left out of lively conversations about sports or hunting may also find themselves out of the friendly loop in which important as well as unimportant information goes around the office.

Small talk is not just an aid but a necessity- the grease that keeps the gears running in an office. This discovery was made by a woman who was hired as the chief editor of a magazine. When she got into the top slot she tried to run the office as her predecessor had: no time for small talk; get right down to business. After a while, she began to hear rumblings that the women in the office were unhappy with her. They felt she was cold and aloof that power had gone to her head and made her arrogant. She had to modify her style, taking some time to talk, to check in with people about their personal lives and exchange pleasantries. The feeling that their bosses are interested in them personally may be common to many people, but women are more likely to expect it to be displayed as interest in their lives outside of work-especially by other women.

A woman who works with men might find it useful to learn something about sports to take part in those conversations. One woman said that she learned she could have a

pleasant interchange with men in her office by saying. "Hey, wasn't that an incredible game last night?" She would get an animated response, even if she had no idea what game they thought she was referring to. Another woman, however, commented that although she was an avid sports fan who always knew exactly what game was played the night before, she still couldn't take part in the men's conversations about them. I would not discount the possibility that the men she worked with might simply have not wanted her to take part - either because she was a woman or because they didn't like her. But it is also possible that the way she thought it was appropriate to talk about sports was not the way they were used to. Sports talk, like any conversational ritual, has to be done in an agreed-upon way. For many men, sports talk is a playful game in itself, composed of attack, counterattack, and teasing. "Wasn't Jones incredible?" "Jones?! You like that creep?! I can't believe they keep him on the team! It was Smith who won that game." "Smith?! Are you 'for real? That turkey couldn't catch a ball if it was handed to him!"

How much small talk is expected, and when, is also a matter of individual style. There are people who find it appropriate to call someone on the telephone and jump right to the point of the call rather than 'waste time' —or stand on ceremony-with long-winded greetings. The very fact of omitting a greeting can imply, "We're on such good terms we can dispense with the niceties that people who know each other less well are bound by." But not everyone agrees that this is appropriate; to some people it is rude. A new employee called his boss and started right in with what he needed so as not to impose on her time any more than necessary. "Frank," she said, cutting him off. "First of all, good morning." That made it clear that she was not someone who liked to dispense with small talk.

Section 3: Facilitator/Change Agent's Skills - Influencing Processes

Facilitator/change agents play a key role in changing their organisation into one, which is more gender-friendly. What precisely makes a specific organisation gender-friendly – a certain percentage of female staff in the organisation or at various levels, mixed teams, gender-neutral posters, gender-differentiated monitoring systems, etc - cannot be defined in general. It depends on the characteristics of the organisation, the context in which it operates and, very important, on the various perspectives within the organisation. We have dealt with these characteristics in Part 2 - Section 1, Exercises D and H. A major task and effort of facilitator/change agents is to influence others with their variety of perspectives in such a way that they support the process of making their organisation gender-friendly. Some may become very enthusiastic and take part in discussions and activities themselves. Others may be indifferent though not hindering the process. All the steps of planned organisational change require 'influencing others' (see Box 4): from finding allies or a support team and establishing willingness at management level, to jointly developing strategies and plans for change. Implementation of plans usually needs negotiation about measures, conditions, etc.

Influencing has a content objective, i.e., stating what you want from the other person or 'party', and a relationship objective, i.e., what relation you want to build with the other (party). The content objective is an aim deducted from the overall aim of change. The relationship objective indicates that influencing concerns interaction. As in all interaction processes power comes into play. Consciously or not the actors will set in their power base, maybe to win, maybe to resist. A facilitator/change agent has to know what her/his power

base is: is it position, is it knowledge, is it the support of a large number of staff, is it connection with important outsiders? (see Box 10). But more than that: she/he needs knowledge about the power base of the one to be convinced. Effective use of one's source of power is only possible if the other is receptive to it. A male staff member can ignore the arguments of his female boss just because it is a woman who is talking. A male manager could listen with interest to recommendations of a highly acknowledged staff member, but close his ears the moment he hears the word 'gender'.

The outcome of influencing this power play could be that the other agrees with or rejects ideas. Rejection can take different forms as we have seen in Box 5. Someone can resist openly or directly and hidden or indirectly. Shelving or proposing an investigation is an indirect form of resistance. Aggression is a form of indirect resistance, not openly showing what is at stake; arrogance, submissiveness and withdrawal are other indirect forms. Another outcome of influencing processes could be compliance: merely going along with a request or demand without believing it. Somebody can follow a request to form a team of both male and female staff, but that does not necessarily mean that he or she believes that men and women can make equal contributions to discussions or to work.

Our dictionary

By **influencing**¹² we mean: exercising 'power' to affect somebody's character, beliefs or actions or: the process by which one or more persons successfully persuade others to follow their advice, suggestions or orders.

The outcome or effect of influencing can be the following.

- **Commitment** or internal agreement
- **Compliance** or merely going along with a request or demand without believing it.
- **Resistance** or rejection (which can take different forms, see among others Box 5)

We use the word 'influencing' to cover various activities all aimed at persuading others to follow advice, suggestions or orders: from convincing to negotiation and bargaining. In some situations one does not mind 'to give' in. In others one does not want to make any compromise. In another situation one seeks a win-win outcome in which both parties have the feeling that they, to a certain extent, benefit. In all these situations different forms of power will be used: from power over, threatening for instance with punishment, to power with, pointing to the large group of supporters.

Summarising, important considerations for a facilitator/change agent concerning influencing are:

- why do you want to influence, what is your intention, what do you want to achieve (minimum/maximum range)?
- who are essential to be influenced to achieve your intention?
- where do you influence - meeting, corridor, informal setting?
- when do you influence?
- and, of course, influencing processes should be well-prepared, well-strategised, and well-planned.

About why: know what you want and know the situation within and outside the organisation.

¹² Based on Kolb et al. (1995) pp 402.

Before a facilitator/change agent can discuss about organisational change with others she/he must be very clear about why changes are necessary in the organisation. What is felt unacceptable and what should change must concretely relate to the short-term aims of the change process. The long-term aim, i.e., how the gender-friendly organisation should look, may be difficult to describe in detail. And better that it is this way, for it is more desirable to develop a vision about this ideal together with others.

Change regarding gender often has an emotional component. In many cases such emotions do not convince others easily of the need for change – they want to hear facts, figures, arguments. Therefore, a facilitator/change agent needs knowledge about the situation regarding gender in the organisation, the position and condition and felt needs and interests of male and female staff (see Part 2 - Sections 1, 2). Much can be taken from what happens elsewhere. How does one's own situation compare to that in other organisations? What are general experiences with organisational change regarding gender? Are the issues to be addressed matters of a more general debate? What arguments are used to promote gender-related change?

About who and where: the 'entry points'

Although processes of change concern most if not all staff members, not everybody will be directly involved. Most important are the influential people in the organisation whose degree of interest or commitment will make or break the process. These people can be identified by making a 'social picture' of the organisation. Furthermore, it is important to find the best entry point to 'influence' others: is it during certain discussions, is it before papers are signed, or are short talks in the corridor before decision-making meetings more effective? One has to look for procedures and decision-making processes: what are the procedures in signing papers, who are the critical people to sign, where do discussions take place?

Apart from influential or powerful people there is another group of staff members to 'influence'. Facilitator/change agents need a group of supporters or allies to jointly plan and implement the process of change. They also need a 'constituency', not only to get feedback, but also to create a mass or 'power with' – an important source of power in influencing processes. See more in Section 4 of this Part 3.

About when to influence

A first step of planned organisational change is scouting (see Box 4), necessary to determine whether change in terms of gender is feasible. It could be the wrong moment to discuss the organisational situation regarding gender. All minds, for instance, can be occupied by a discussion with clients or donors affecting the survival of the organisation, or by an evaluation of a major programme, etc. On the other hand, discussions about policy change or re-organisations could be excellent occasions to convince people of the need to address gender issues. At a more individual level, minds can be 'blocked' due to worries or other preoccupations at work or home. Therefore, a facilitator/change agent has to carefully consider the right timing with efforts to approach people.

About how to influence

Influencing others can be done in many ways, which can be summarised as follows:

- through persuasion, for instance, using logic, facts, giving ideas, proposals, etc;
- through reward or punishment, for instance, offering incentives, using pressure, checking frequently on somebody's work, etc;

- through participation and trust, for instance, through recognising others, involving others in activities, etc; and
- through common vision, for instance, through building a group spirit or feeling of togetherness, a 'we feeling', shared identity, etc and so on

Guidelines on how to convince, negotiate, and so on are difficult to give, because these processes are determined by the organisational and/or national culture and are often highly sensitive. In some cultures care is taken not to make individuals lose their face, in others people put demands straight forward; in some places formal ways are required, in others informal. A few other factors also affect the choice of influencing tactics.

A first factor concerns the person or persons to be influenced: What is his/her degree of motivation or resistance to discuss gender issues and to promote change? Why does he/she think, feel and act that way? What would be his/her interest to agree with a certain point of view? In Part 2 - Section 3 we have dealt with resistance and motivation; we refer in particular to the Boxes 5, 6, 7, 8. The reasons behind resisting behaviour may be difficult to detect, especially the hidden forms of resistance (such as aggression, arrogance, submissiveness, or withdrawal). In Box 13 some possible hints are given for how to deal with resisting people.

Other factors affecting the choice of tactics have to do with the organisation. Generally spoken, tactics which fit the character of an organisation may be more successful. Examples are putting proposals on the agenda of important decision-making meetings, organising meetings with male and female staff separately according to the prevailing segregation lines, following the exact organisational procedures, linking a policy discussion on gender to general policy discussions, and so on. On the other hand, a very innovative or creative approach could have positive results. Exchanging, for instance, all the pictures with people in the building of a male dominated organisation with pictures of women could create a lot of discussion in a good atmosphere.

Apart from its characteristics, the internal situation of an organisation regarding gender is a factor to consider when choosing influencing tactics. In Table 3 we have shown some different situations and related 'typical' strategies.

A last factor concerning the choice of influencing factors we want to point at has to do with the personal capacities and qualities of the facilitator/change agent – see for instance the personal sources of power (Box 10) and Exercise D – Part 3 on core quadrants. Every facilitator/change agent will develop her/his own preferred style in influencing. Maybe this style does not fit a certain situation in the organisation, but a skilful facilitator will then delegate roles to others of his/her support group. This is another reason to follow the facilitator/change agent's 'rule': do not work alone.

Box 13: Dealing with resistance: some possible hints¹³

Dealing with aggression: first let the aggressive person throw out his/her aggression; then start finding out what is the real reason behind it.

Dealing with arrogance: do not start defending yourself; go along with it while asking for reasons and try to pick up signals of what is really wrong.

Dealing with submissiveness: when somebody shows contradictory behaviour point that softly out to the person: for instance, outwardly he/she seems to comply with everything but sometimes he/she shows his/her real feelings. Stimulate the person to find solutions him/herself, in order to get him/her out of passivity.

Dealing with withdrawal: give space and understanding, make the person speak out through active listening.

Countering denial: present irrefutable statistical evidence of actual gender gaps and of discriminatory practices. If necessary commission desk research and even original empirical research for presentation of the facts.

Countering inversion: present actual examples, even first-hand accounts of gender discrimination in women's access to resources and opportunities. Concentrate on examples of clear contravention of the principles of equality of opportunity.

Countering dilution: be alert to the presentation of a gender issue purely at the level of access to resources and facilities. Counter by revealing the dimension of the problem arising from gender discrimination, women's lack of participation and lack of control of resources and decision-making.

Countering selection: do not be content with the identification of gender issues at the level of defining the problem. Closing gender gaps is matter of taking actions related to all the three organisational dimensions (technical, socio-political, and cultural).

Countering subversion: be alert to any tendency for lack of interest in the progress of addressing gender issues. When necessary, look for alternative departments or units to implement the actions decided upon.

Countering compartmentalisation: ask for overall attention to gender issues. In a meeting where gender issues have been regulated as unimportant issues constantly ask questions and remind members about the actual pervasive and crucial nature of gender issues.

Countering shelving: take a shelved action to an alternative department or unit or take it to another level in the organisation depending on interest and capacity.

Countering investigation: do not deny that more needs to be learned and support the need for further research but argue against this being a pre-condition for action. Recount all the aspects of the problem and causes that are already established and argue for preliminary action on the basis of what is already known. Refer, if necessary the discussion to a higher level to get their views on 'this important issue of research'.

Countering lip service: ensure that the organisation develops its own system for monitoring and evaluation the actions related to change and involve different people/levels in the monitoring.

Countering tokenism: when you find yourself in a meeting with a 'token woman' join with her in identifying and pursuing gender issues and encourage others to join the process. If you are the token bring this fact to the attention of the group.

¹³ Partly based on Sher (1996)

FURTHER READING

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EXERCISES: FACILITATOR/CHANGE AGENT'S ROLE IN INFLUENCING PROCESSES

K. Powerless and powerful

Aim of the exercise: to increase awareness about one's own power and how power is perceived

Time: 50 - 60 minutes

Method: individual reflection, group exchange, visualisation

Materials: whiteboard

Steps

1. Discuss the concept power. Explain the aim of the exercise.
2. Ask each participant to think about a situation in which she/he felt powerful and a situation in which she/he felt powerless. What did they feel in both situations?
3. Ask to exchange the experiences in small groups. Let them select one situation of powerfulness and one situation of powerlessness to visualise in a non-verbal way (drawing, a statue, mime, and so on).
4. Discuss the group performances in the plenary. What did they learn from doing the exercise?

L. Power within the organisation

Aim of the exercise: to increase understanding about the use of power and its effects on others.

Time: 90 - 120 minutes

Method: individual reflection, group discussion, visualisation

Materials: pen, paper, whiteboard, handout of Exercise L (table on power, its use and sources), hand out Box 10.

Steps

1. Discuss the concept power. Refer to Box 10. Explain the aim of the exercise. As facilitators, participants deal with different groups or individuals in their organisation who all have power. The exercise is meant to understand power better – as it is used by her/him and by others in her/his organisation with whom she/he (has to) deal(s) as a facilitator of change processes regarding gender.
2. Ask each participant to list the (groups of) people she/he deals with or has to deal with frequently as facilitator. Try to be specific. Let the participant indicate what type of power she/he uses as a facilitator, when, and towards whom. Ask to specify her/his source of power. In interaction processes both 'parties' use power. Let the partici-

pant indicate what the source of power is as used by the other person. They should use the handout – table on power, its use, and sources.

3. Form small groups of 3 or 4 persons to exchange individual experiences. Ask them to discuss what type of power and what source of power they find most effective and what least effective. Let them visualise in a non-verbal way (drawing, statue, and so on) an effective form of power of a facilitator – as a group or, if that is too difficult, individually.
4. Discuss the visualisation and group outcomes in the plenary. Pay specific attention to power and gender.

M. Resistance within the organisation

Aim of the exercise: to understand better resistance of people and their possible sources of resistance in order to be able to deal with resistance in a more effective way as a facilitator/change agent.

Time: 60 – 90 minutes

Method: individual reflection, group exchange, role play

Materials: whiteboard, hand out Boxes 6, 7, 8.

Steps:

1. Explain the aim of the exercise. The participants will prepare an action plan on organisational change regarding gender (or have prepared one – see Exercise Q - Part 2) to be implemented in the own organisation. This exercise will help to deal with resistance better.
2. Ask each participant to list the individuals she/he has to deal with frequently in the coming six months when implementing activities as a facilitator.
 - a. Let them indicate what level of resistance they have based on the SARAR continuum – see Box 7 (handout).
 - b. Ask them to identify what could be the sources of resistance of each individual– see handout of Box 6
 - c. In the power exercise, L, they have listed the groups in their organisation they deal with as facilitating agent. Ask each participant to select the groups he/she is going to deal with in the coming six months during activities from her/his action plan. Let them indicate their group resistance level –see handout, Box 8.
 - d. Let them identify what could be the sources of resistance of each group she/he mentioned.
3. Form small groups to exchange individual findings. Let them identify as a group one or two most important sources of resistance of individuals and/or a group in their organisations. Ask them to prepare and conduct a role play to show resistance.
4. Discuss in the plenary how to deal with resistance and the major outcomes of the individual and group efforts. What did they learn from this exercise?

N. Chairs – and power

(Pretty et al. 1995, pp167).

Aim of the exercise: to increase understanding of group dynamics: power, resistance, and influencing

Time: 30 - 45 minutes

Method: game

Materials: A room without tables and enough chairs for each participant-cards with instructions

Steps

1. Prepare the room: make a big empty space in the centre and put at random enough chairs for each participant to sit. Prepare three sets of cards with the following instructions.
 - a. Put all the chairs in a circle. You have 15 minutes to do this.
 - b. Put all chairs near the door. You have 15 minutes to do this.
 - c. Put all chairs near the window. You have 15 minutes to do this.
2. Explain that the exercise helps to experience mechanisms of power, resistance, and influencing. Give each participant one set of instructions (A, B or C), distributing equal numbers of the three different instructions. Tell them not to show their card to others, as this will defeat the purpose of the exercise.
3. Tell everyone to start according to the instructions given to them. What follows may be a chaos of dragging chairs, protecting one's own chair, forcing others to give way, and so on.
4. After 15 minutes stop the game. Discuss how people feel. What happened? Did they feel that they owned the chair they were using? Did they notice the behaviour of others? How did they feel about others' behaviour? Did they cooperate with anyone? Why (not)? Did they follow the instructions – why (not)? How would they behave a second time? How does the game reflect real life situations?

O. Influencing tactics – 1

Aim of the exercise: to increase understanding about resistance and influencing tactics

Time: 60 – 90 minutes

Method: group discussion, role play, handout of exercise O (description of role play on GWG)

Materials: pen, paper, cards

Steps

1. Discuss influencing tactics and explain the aim of the exercise.
2. Form small groups and give the handout to each participant. Ask them to discuss the following questions in their small group.

- a. From which categories would you try to include members in your GWG? Why?
 - b. Which tactics would you use to convince the selected people to become GWG members?
 - c. Prepare a role-play in which you show the tactics chosen by you.
3. After performance of the role-play in the plenary, discuss about the tactics and the reasons behind the choices for these tactics.

P. Influencing tactics - 2

Aim of the exercise: to increase understanding of tactics to influence people

Time: 60 – 90 minutes

Method: role-play

Materials: handout of exercise P (Description of role play on Equal Opportunity Policy)

Steps

1. Explain the aim of the exercise: using their increased understanding of power, sources of power, resistance, and sources of resistance.
2. Ask them to prepare a role-play and give the handout about the situation. The assignment to the players is to show a role-play demonstrating the meeting of the three GWG members and the six members of management. The intention is to come to an agreement about the need to have an Equal Opportunity Policy in the organisation. Divide the players and non-players – they will be observers.
3. After the performance discuss the role-play in the plenary. What processes took place? What arguments were used? How did people react towards each other? Was there any critical or breaking point in the discussion?

Q. Negotiation

(Adapted from DeBeuk 1994)

Aim of the exercise: to increase understanding of and skills in negotiation

Time: 90-120 minutes

Method: simulation

Materials

Steps

1. Discuss the process of negotiation and skills required. Explain that two sets of negotiation will be simulated by two groups of participants. In the negotiations two parties are active: the facilitator and (members of) her/his support group and higher management level.
2. First select a topic for negotiation. Then, from two groups to prepare a simulation, the two parties concerned. The participants left are observers. Ask each group to

prepare separately the simulation: the aim they want to realise, the tactics to be used, the roles of the different actors. Not all group members necessarily have to play a role in the negotiation, they can select a few for the real simulation.

3. Ask them to perform the play and discuss what happened with the input of observers. Was the aim reached? Why (not)? What were the roles of the different parties and actors? What could be said about the process of negotiation? What could be improved?

HANDOUTS OF SECTION 3 – PART 3

Handout of exercise O – Description of role-play on GWG

You are a small group of members of an organisation. You want to establish a Gender Working Group (GWG) to discuss strategies to change the number of professional staff. Presently 80% are men and 20% are women. Not all people in the organisation are interested in or willing to discuss about gender. In fact, five categories can be distinguished (see also Box 7).

1. The group that does not recognise gender issues as a priority and which will argue its case ('tough guys').
2. The group that, for whatever reasons, acknowledges gender issues, but in such a fashion as to raise more questions than it resolves.
3. The group that is self-critically concerned to take gender issues on board but which, for different reasons, is unable to do so satisfactorily.
4. The group that is clear and enlightened in its analysis but which represents a sector that does not embody a priority for the organisation.
5. The group that likes to take initiative, also to address gender issues ('innovators').

Handout of Exercise P: Description of role-play on Equal Opportunity Policy

In an organisation the number of male and female staff at all levels is unequal. At the higher levels there are less women than men, at the lower levels it is the opposite situation. This inequality in numbers is recognised by most people at higher and at lower levels– it is a gender-aware organisation. This recognition is to a great extent due to the effective work of the Gender Working Group, consisting of 3 higher level and 2 lower level staff, both men and women.

The Gender Working Group feels that the time is right for an Equal Opportunity Policy. Such a policy includes measures for both men and women with the objective of changing the under-representation of women and men at certain levels.

Three GWG members meet for the first time with the management to discuss about the need for an Equal Opportunity Policy in the organisation. The management consists of six members – see the characters in Exercise I, Part 3.

Help in the discussion

The following arguments against an equal opportunity policy or implementation of such a policy are heard (based on reality).

- 'At the moment there are more important issues we should be addressing.'
- 'Men and women within our organisation already have equal opportunities.'
- 'We would like to but are unable to find capable women.'
- 'Women do not want it themselves.'
- 'Women are too emotional, irrational, and fickle for such a position.'
- 'It has been always like that, so why change!'

Handout of exercise L: POWER, ITS USE AND ITS SOURCE

Type of power	Used by you?	When do you use it	Towards whom do you use it	Your source of power	Their source of power
Power over					
Power to					
Power with					
Power within					

Section 4: Networking: Building Support Groups and Networks

Even for a five-legged facilitator/change agent, it is impossible to realise change within the organisation alone. A facilitator/change agent needs others to keep up the spirit and, moreover, to give form to and guide the process of organisational change in a better way. More people have more ideas, insight, knowledge, and skills and are better able to sense what is happening in the organisation. More people also means more strength: they have the 'power with' (see Part 3, Section 1) required to influence processes.

Networking

Networking within the organisation and outside is an important activity of a facilitator/change agent from the very start of a planned change process. It continues during all steps of the process. Networking is about making contact with others. It is an activity involving communication, sharing ideas, and planning with other people. Networking can be done informally and formally. A facilitator/change agent can contact other staff members or people from another organisations to share information on a regular basis. She or he can formally invite an organisation to join regular formal meetings.

Networks

The result of this networking can be the establishment of a network, a kind of partnership of individuals and groups. 'Establishment' sounds formal, but many networks are informal. They can be set up formally as well, while some informal networks develop into formal ones over the years. Other networks die, because they have reached the aim they stood for or because of internal weaknesses or maybe due to external factors, forcing them to stop operating.

A support group of a facilitator/change agent is a network, having an aim and members. These members can be colleagues but also people from outside the organisation. We know facilitator/change agents who belong to a support group of people involved in processes of gender-related change in different organisations. This group is of great importance to them as a forum for sharing information and for giving courage to each other. A network within an organisation could function informally, but it can also be a formal and recognised body with a clear mandate.

Our dictionary

Networking can be understood as seeking relationships with others to exchange knowledge, information, and experiences and to build alliances to develop and implement new ways of doing things (Karl et al. 1999). Thus, people can strengthen their capacities.

A network refers to partnerships of individuals and groups who have come together for a particular purpose. These partnerships are affiliations of INDEPENDENT individuals and organisations.

Facilitators can build support groups or networks of different forms. Different models of networks are presented in Box 13. The form a network takes will depend on the situation in the organisation: how many people are interested? What could be strategic relationships? What model fits in with the culture and structure of the organisation?

Building a support group

A first consideration for a facilitator is 'where can I find members for my support group? Do I want like-minded people to work together with me? Or shall I opt for staff members with strategic places and positions in the organisation? Or should I choose a mixture? How many men and women should be included? To what extent will they be able to listen to each other and cooperate? Again, much will depend on the situation and characteristics of the organisation, but also on the facilitator/change agent's capacity to get and keep people together.

Coming together is the beginning, keeping together is the process and working together is the success', in other words: how can the facilitator/change agent form a strong group of allies? A strong group scores on 'Cs': competent, constructive, communicative, consistent, courageous, creative, confident, cooperative. To form such a group certain things are important. The group is formed to do something, it has a content objective related to organisational change regarding gender. Therefore, the group or network should serve a need of its members. To keep the group together all should be committed to a common cause. The group needs a vision and aim. And, based on that, the group should plan, monitor, and evaluate. Apart from the content objective, a group has a relationship objective. Such relationships between members should be built and maintained to ensure that all talents in the group are contributing towards achieving the objective. Very important to the continuity of the group is the establishment of trust amongst its members. Members should be able to participate fully and should be made accountable.

Thus, an effective team addresses three fundamental needs²: to fulfil a task, to build and maintain a group, and to create space for individuals to express themselves. Fulfilling a task requires certain behaviour - team or task behaviour - which include making suggestions, defining problems, seeking or giving information, clarifying, interpreting or summarising ideas, and seeking or taking decisions. Group behaviour has to do with the relationship objective. It includes reconciling differences between group members, reducing tensions, keeping communication channels open, modifying personal views in the interest of group cohesion. Lastly, teams are only effective when individual behaviour supports the content and relationship objectives, i.e., when individuals can openly express their needs and interests. If individuals show destructive behaviour, for instance, dominating others, forming sub-groups, withdrawing, grumbling outside meetings, overt or implicit blaming of others, withholding information, polarising, and so on, a group will not function well. A facilitator/change agent should concern her/himself with these three needs: communication skills, influencing skills, and conflict management are critical to building a support group- the topics we have dealt with in previous sections.

In Box 14 we have summarised some important steps in building a support group.

Box 14: Steps in building a support group or network within and/or outside the organisation and outside

1. Find 'members' or allies

- Start with people you know - ask if they know others.
- Look around: who is going to certain meetings? what kind of person is he/she? what kind of opinions/feelings, knowledge, skills does she/he have?
- Look at (local) libraries or resource centres for names (of persons and organisations).

2. Build your support group. Think about the members' need to be served, a common cause to be committed to, a group vision and aim, a plan, monitoring and evaluation, trust, a mechanism for participation and accountability.

3. Discuss the what and how of organisational change. Plan for organisational change as a group - see Box 4 in Part 2, Section 3: Steps in Planned Organisational Change.

4. Monitor and evaluate the internal dynamics of the support group - are all the ingredients for a strong group present (see Step 2) and do they mix well?

In the exercises below we have included exercises on team building.

FURTHER READING

Clark, N. (1994) *Team Building: A Practical Guide for Trainers*. Berkshire, U.K.: McGraw-Hill Book Company Europe

Cummings, S.; van Dam, H.; Valk, M. (eds.) (1999). *Women's Information Services and Networks: A Global Source Book*. Amsterdam: KIT Press.

Karl, M. (ed). with Anand, A.; Blankenberg, F.; van Den Ham, A.; Saldanha, A. (1999) *Measuring the Immeasurable: Planning, Monitoring and Evaluation of Networks*. New Delhi: Women's Feature Service and NOVIB.

Svendsen, D.S.; Wijetilleke, S. (1986) *Training Activities for Group Building, Health and Income Generation*. Colombo: Women's Bureau of Sri Lanka.

EXERCISES: BUILDING SUPPORT GROUPS AND ALLIANCES

R. Cooperative squares

Pretty et al. 1995, pp 171-172

Aim of the exercise: to understand better how important cooperation is in making a group or team effective

OBJECTIVE	* To experience and analyse some of the elements of cooperation, for individuals to look at their own behaviour when working in a group
MATERIALS	A table for each group of five people and five envelopes containing pieces of card as indicated in the figure below
TIME	About 1 hour (5 minutes introduction, 20 minutes task, 20-30 minutes evaluation)
PROGRAMME	<p>1. Prepare the cards. For each group of five people you will need five envelopes labelled A, B, C, D, and E, and five pieces of thin card 15 cm square. It helps if each group has a different colour and if the envelopes are labelled with the colour ('pink A, pink B, pink C', etc). For each group, cut the five squares exactly as shown in the figure. All the cuts are either to a corner or to the middle of a side. It is essential that you measure and cut accurately. Label the pieces as indicated, and put the pieces into the corresponding envelopes.</p> <p>2. Start the exercise by explaining that this exercise allows us to look at what is essential for successful group cooperation. Ask the participants to form groups of five and to sit around a table. (It is possible to have one extra person to observe each group.)</p>
PROCEDURE	<p>3. Then read the instructions to the whole group.</p> <p>"Each of you will have an envelope which has pieces of cardboard for forming squares. When I give the signal to begin, the task of each group is to form five squares of equal size. There are two important rules:</p> <ol style="list-style-type: none">1. no one may speak or signal - the task must be done in silence, and2. no one may take or ask for a piece from any other person, but they may give pieces to others." The task is completed when each individual has before her or him a perfect square of the same size as those in front of the other group members.

COMMENTS

Looking at the diagram of the five squares, it seems very easy, but trainees usually end up with three or four squares and odd bits that just won't fit together. Participants come to realise that their individual desire to produce one square is secondary to the group task of completing five squares. Personal success does not always equal group success and may actually impede the group goal. A good solution for one person may in fact obstruct a good one for the group as a whole. Within the rules of the game, each group can make its own rules. For example, all the members might decide (without talking or gesturing) to give all their pieces to the fifth. That person then does not have to wait for the others to give one piece at a time - but it is limiting as it is not possible to use the others' help.

It is important to spend some time on feedback from this exercise. The trainer may elicit responses from the groups by asking the following questions.

- "What happened? Was the task achieved quickly? Why not?"
- "Did the group cooperate? Would increased cooperation have speeded things up?"
- "What roles did different people in the group play?"
- "Did anyone feel frustrated? How did they deal with this?"
- "Did anyone break the rules? How?"
- "What did the observers notice?"

It might be a good idea to discuss the roles played by different group members.

S. Rope square

Pretty, et al. (1995)

Aim of the exercise: to become more aware that people with different skills can enrich a group and will make a group more effective

OBJECTIVES

- * To explore how a group works as a group on a different task
- * To illustrate how people adopt different roles in a group

MATERIALS

A piece of rope that is tied so that it forms a circle, long enough so that half the total group can hold on to it with both hands

TIME PROCEDURE

20-30 minutes, depending on how long you debrief

1. Divide the group into two- the silent observers and the square-formers.
2. Lay the rope in a circle on the floor in the middle of the room.
3. Ask the square-forming group to stand in a circle around the rope. The observers should stand back and watch in silence.
4. Ask the square-forming group to pick up the rope circle with both hands.
5. Ask the square-forming group to close their eyes and walk around in a circle a couple of times so that they become somewhat disoriented.
6. Then ask the group to form a perfect square with the rope (without looking).
7. The other group should observe the dynamics, without commenting.
8. Change the roles of the groups, and then debrief.

COMMENTS

This is potentially a very powerful exercise, revealing a lot about the different types of actors within a group, including leaders, saboteurs, and so on (see Chapter Three). There are almost always too many leaders. Use the discussion to draw these points out: "Who felt frustrated?"

"Were the instructions given by other group members clear?"

"How did you respond to contradictory orders or requests?"

"Who took the lead? Why? When?"

"Who played a bridging role?"

"Who kept quiet?"

"Who cross-checked and evaluated orders from others?"

The intention is not to make the evaluation personal, but to point out the range of qualities of members of a group and how they interact successfully and unsuccessfully in completing a difficult task. A variation is to ensure that participants do not speak. This makes it more difficult.

T. Networking and forming a network

Aim of the exercise: to improve the participant's understanding of networking and/or on strengthening already existing networks of participants engaged in gender-related organisational change

Time: 60 minutes

Method: individual reflection, group exchange

Materials: pen, paper

Steps

Discuss about networking and networks. Explain the exercise. There might be participants who have formed a support group to promote gender-related organisational change, while others have not thought about it or have not taken action yet.

1. Ask those who have no support group or alliances to make a plan to find allies by answering the following questions.
 - a. Reflect upon why you need a support group, what should be the purpose of your group?
 - b. Map the contacts you have inside and outside your organisation concerning gender (Venn diagram).
 - c. Make a selection of people whom you would like to have in your support group – which criteria do you find important?
 - d. Plan how to contact them and motivate them to become members of your support group.
2. Ask those who have formed a support group to reflect on the functioning of their group.
 - a. What is the group's common cause?
 - b. What is its vision and aim(s)?
 - c. What has been the motivation of the different group members for joining the group?
 - d. Do members participate in discussions and activities?
 - e. Do members feel accountable?
 - f. What are the group's sources of power?
 - g. Does the support group have a proper plan, does monitoring and evaluating take place?
3. Form groups to exchange the experiences. Mix participants who have formed a support group with those who have not yet formed one to promote learning from each other.
4. Discuss the major learning points in the plenary.

U. Promoting participation in discussion

Adapted from Svendsen, D.S. and Wijetilleke, S. (1986) T

Aim of the exercise: to increase awareness about one's own behaviour in group discussions and to understand better the importance of participation of all group members

Time: 30 – 40 minutes

Method: game

Materials: matches or small sticks, whiteboard

Steps

1. Explain the aim of the exercise and the procedure of the game. Eight participants will be invited to discuss a certain topic. Each of them receives 5 matches or small sticks.

- Every time a participant speaks she/he must put a match/stick in the centre or on the table. When she/he does not have any matches/sticks, she/he can no longer speak.
2. Write the topic of discussion on the whiteboard, for instance, what should we do if during a field visit a team member is overenthusiastic and keeps interrupting the farmers when they are speaking?
 3. Start the discussion. Finish when all matches/sticks are put in the centre or only one participant has any left.
 4. Discuss in the plenary how the discussion group felt about their participation? Did they feel frustrated? Is what happened during the discussion different from the situation at work? How can dominant behaviour be avoided? How can silent people be encouraged to speak? Why is the participation of all important?

Variation

You can use stricter rules, for instance, participants who make any comment, even one syllable, should place a match on the table.

V. Decision-making in a group

Aim of the exercise: to get a better insight into decision-making processes and to recognise task, group, and individual behaviour

Time: 60 minutes

Method: simulation

Materials: paper, pen

Steps

1. Explain the exercise. Refer to the three fundamental needs of a team. The participants will prepare and simulate decision-making in a group. This group has the task (task behaviour) to make a decision. It should be done in such a way that the members stay together as a group (group behaviour) and that room is given for each member to express her/himself (individual behaviour). The decision-making effort concerns agreement and ranking in order of priority the five most important steps in a process of organisational change regarding gender (any other topic of ranking appropriate to the background of the participants can be chosen). The 'team' has 15 minutes to do this.
2. Each participant involved in decision-making is assigned another participant as observer. This observer should make notes of the following.
 - The number of contributions made by her/his 'partner' to achieve the task. She/he should add some examples and also try to assess the effect on others.
 - The number of contributions made by his/her 'partner' towards group cohesion. She/he should add some examples and also try to assess the effect on others.
 - The number of contributions made to express individual needs or interests. She/he should also try to assess the effect on others.
3. Discuss the process of decision-making in the plenary. How did the participants feel about the process and their roles? What did their partners observe? What lessons can be learned from the exercise?

PARTICIPATING COUNTRIES OF THE HINDU KUSH-HIMALAYAN REGION



Afghanistan



Bangladesh



Bhutan



China



India



Myanmar



Nepal



Pakistan

International Centre for Integrated Mountain Development (ICIMOD)

4/80 Jawalakhel, G.P.O. Box 3226, Kathmandu, Nepal

Telephone

+977 1 525313

Facsimile

+977 1 524509

+977 1 536747

Email

distri@icimod.org.np

Web site

<http://www.icimod.org>

Cable

ICIMOD Nepal