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

VOLUME I: REPORT

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DISCLAIMER

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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Acronyms

ADS	Automated Directive System
APS	Annual Program Statement
CBO	Community Based Organization
CCA-ECI	Corporate Council on Africa - Ebony Consulting International
CEDAW	Convention to End Discrimination against Women
CTO	Cognizant Technical Officer
DG	Democracy and Governance
DMD	Deputy Mission Director
DTS	Development & Training Services, Inc.
EG	Economic Growth
EQUATE	Achieving Equality in Education task order contract
FFP	Food for Peace
GAT	Gender Action Team
GATE	Greater Access to Trade Expansion
GBV	Gender-Based Violence
GFP	Gender Focal Point
HIV/AIDS	Human Immunodeficiency Virus/Acquired Immunodeficiency Syndrome
HSRC	Human Sciences Research Council
IGWG	InterAgency Gender Working Group
IQC	Indefinite Quantity Contract
ISLGS	Increasing Sustainable Local Government Services
LGS	Local Government Services
MAP	Men as Partners
MSI	Management Systems International
NGO	Non-governmental organization
OAA	Office of Acquisition and Assistance
OFDA	Office of Foreign Disaster Assistance
OGAC	Office of the Global AIDS Coordinator
OVC	Orphans and Vulnerable Children
PIRS	Performance Indicator Reference Sheets
PMP	Performance Monitoring Plan
PPDO	Program and Policy Development Office
RFA	Request for Assistance
RFP	Request for Proposal
RHAP	Regional HIV/AIDS Program
RIG	Regional Inspector General's Office
SAG	South African Government
SAIBL	South African International Business Linkages
SO	Strategic Objective
SOAG	Strategic Objective Agreement
SOW	Scope of Work
TA	Technical Assistance
TB	Tuberculosis
TDY	Tour of Duty
USAID	US Agency for International Development
VEP	Victim Empowerment Programs
WID	Women in Development

EXECUTIVE SUMMARY

The USAID Mission in South Africa demonstrated an extraordinary commitment to integrating gender in its programs, as well as increasing the awareness of gender issues among all Mission personnel, including support offices. A four-person team of gender trainers worked with Mission staff from SO teams, regional teams, and support offices, conducting 16 different training sessions on gender awareness, gender sector skills, and facilitated working sessions. These 2005 Gender Training & Technical Assistance (TA) activities represent the third stage of this significant commitment, which was preceded by a Gender Assessment in 2004 and participation by some Mission personnel in a regional gender training in 2004.

For this assignment, three deliverables were requested: (1) Targeted training for each Strategic Objective (SO) team, (2) Facilitated working sessions leading to sector-specific Action Plans, and (3) An overview report on key sector issues. Over the three-week assignment, the Gender Training & TA Team provided several types of training to more than 100 staff members, 39 men and 64 women: (1) *Preparatory meetings* with each SO team, regional team, and technical support offices, (2) *Gender Awareness Training* for the regional and support staff (3-hour sessions), and (3) *Gender Skills Training & Action Planning* for the SO teams. (9 hours of facilitation).

Helping Mission staff learn -- and remember -- to ask the right questions about gender was the foundation of this Team's approach. It is a simple approach designed to maximize long-term learning and to respect the time constraints of Mission staff. The training design makes one important assumption: *Gender is recognized as a significant -- indeed, often critical—factor in a project. However, it is rarely the exclusive focus of any project, but rather an important element that can spell success or failure in achieving results and sustainability.* The core of the training design focused on the two Automated Directive System (ADS) strategic questions (paraphrased):

Gender as a Variable: How do gender factors affect project sustainability, achievement of project objectives, and every stage of the Project Cycle (needs assessment, design, implementation, monitoring, and evaluation)?

Gender as an Equity Issue: How do project results affect the relative status and power between the sexes and the achievement of gender equality?

To address Gender as a Variable, the Team used a new tool, The CRIB Sheet, to help Mission staff remember the types of gender questions to ask about their strategies, annual reports, or activity planning documents. Developed as a consolidation of a variety of gender analysis tools from several sectors, the CRIB tool reminds people of four simple areas of questions to ask that might affect any stage of the Project Cycle:

Cultural Roles & Practices
Rights and Resources
Involvement
Benefits

**Crib Sheet (slang): a piece of paper with answers or notes that students use to prepare for an exam.*

To examine project results for effects on gender equality, the Team used an exercise to categorize project results by gender equality whereby Mission staff looked at examples a broad spectrum of sectors and discussed the results in three categories: (1) **Makes Gender Equality Worse**, (2) **Accommodates** Some Gender Inequalities (usually for cultural reasons beyond the manageable interest of USAID) while improving conditions for one sex, or (3) **Makes Gender Equality Better** in terms of relative status or power between the sexes. To learn the difference between sex-disaggregated statistics and gender data, participants examined illustrations of sex-disaggregated statistics and why there is often insufficient without analysis of the different needs and experiences of women and men. In various sectors, participants discussed how parity might not lead to gender equality for women and men.

Each Strategic Objective (SO) team developed a summary of major gender issues in their sector and used the 2004 Gender Assessment recommendations as the basis for development and refinement of their new Action Plans. Most SO team members participated in developing these recommendations, and the draft of the sections was sent to each team for review. As part of the facilitated working sessions for both SO1 and SO6, the teams discussed synergies, challenges and gender issues related to the upcoming combination of their SOs. (See Appendix for full discussion of sector action plans.)

Recommendations focused on ways to institutionalize gender, to keep it visible as a cross-cutting theme in all sectors, along with HIV/AIDS and gender-based violence. Suggestions included ideas of how to bring up gender issues as a routine topic in staff meetings, retreats, and other events. Each team had specific recommendations of how to strengthen the use of a gender lens and gender analysis in their sector.

All the teams highlighted the need for partner organizations to increase their capacity to integrate and analyze gender factors in their projects and to analyze and use sex-disaggregated statistics and gender data. These needs could be met in several ways, but the “how” is important so as not to overwhelm them with materials. The Gender Training & TA Team has left numerous training and resource materials and CD-ROMs, especially in the health area, with the Gender Focal Point (GFP). These materials can be shared with partner organizations as appropriate. The DevTech CD-ROM that was distributed to all training participants will be revised, and the numerous materials will be culled in the spring to highlight the most important documents.

Many suggestions for supporting the South Africa partner organizations also applied to increasing capacity among the Gender Action Team (GAT) members and strengthening ways to most effectively disperse gender information and ideas to the sector teams. Developing a broader membership of two alternates from each Mission sector could ensure greater consistency in communications between GAT and the sector teams. The Mission could explore ways to increase the credibility and prestige of this group and make a strong effort to include men, where possible, and a mix of Americans and foreign nationals among the members so that it could be a more accurate representation of the Mission. Technical expertise can also be an advantage for GAT members so there is greater knowledge of programs and ways of applying gender analysis.

Finally, improved communications does not necessarily mean **increased** communications, given the time restraints of staff members. The “how” of communication in short, lively messages in several media is as important as the “what” of communication about gender. The Gender

Training & TA Team has left numerous training and resource materials and CD-ROMs with the GFP. Some of these materials can be sent in short forms or web links, one at a time.

RECOMMENDATIONS AND OPTIONS FOR NEXT STEPS

Time constraints are widely viewed as a barrier to integrating gender in the organization's day-to-day work. If gender is seen as a separate activity, staff members are less likely to give time for it. One element of the situation may not be time itself, but the view of gender as a discrete rather than integrated task. Race analysis is often seen as a critical element for project success in South Africa. When gender, too, is collectively seen as relevant to work—and to project success, the gender lens will become routine, automatic, and integrated into the organizational culture. Therefore, it is crucial to keep gender visible in ways that staff members find easy, simple and meaningful to their work.

Recommendation #1: Institutionalizing Gender: Keeping It Visible

The Mission could consider using the organizational learning process as a systematic approach to integrate gender more deeply in the Mission organizational culture. While institutionalizing gender to a greater degree, the Mission also recognizes that development and sector objectives are primary, with gender as a critical cross-cutting theme, along with HIV/AIDS and Gender-Based-Violence (GBV) that can affect the success or failure of meeting the primary objectives.

- ⇒ Continue to build a receptive environment for sustaining gender integration. The best suggestions will come from Mission staff themselves and will indicate their continuing interest and commitment.
- ⇒ Continue to disseminate gender information, but look closely at “how.” Short, lively examples and tips could be well received by staff members. Another suggestion from the Mission was to provide gender tips and ideas in the same way as security tips with computer flashes.
- ⇒ Integrate gender with accountability. For example, consider having the Gender Focal Person attend semi-annual sector meetings to assist with reviews of the Gender Action Plans.
- ⇒ Collectively interpret and share gender experience and information at staff retreats and annual partner meetings.
- ⇒ Initiate new, more responsible action (based on learning) and monitor resultant changes. For example, ensure that identified actions are monitored and lead to action reflecting positive change.

Recommendation #2: Increase Partner Capabilities in Gender

One commonality among the teams highlighted the need for partner organizations to increase their capacity to integrate and analyze gender factors in their projects and to analyze and use sex-disaggregated and gender data. These needs could be met in several ways, but the “how” is important so as not to overwhelm them with lengthy materials.

Recommendation #3: Continue Staff Learning about Gender

See the above section for ideas that also apply to staff, using the GAT members as a mechanism.

Recommendation #4: Strengthen the Gender Action Team

As noted earlier, the GAT can play an absolutely pivotal role in keeping gender visible in all the teams, but some of their influence will depend upon support from the team leaders and the climate for gender integration. As an important clearinghouse for gender information, GAT

could analyze how it best wants to receive and disseminate this information throughout the Mission and in what form. (Use of text in emails, attachments, length of information, PDF files, etc. can be the deciding factor in whether information is actually read by staff. GAT members could survey their own team members.)

⇒ The Mission could explore ways to increase the prestige of this group and make a strong effort to include men among the members so that it could be a more accurate representation of the Mission. Because of the difficulty in juggling time, travel commitments and meeting times, one option could be to request that two members of each team be represented as alternates on the GAT. From the teams where this is possible, the ideal would be for the team leader to designate a man and a woman who could also serve as positive role models of men and women working in partnership to ensure gender integration. There should also be consideration of a diversity of American and foreign national staff among its membership.

I. INTRODUCTION

Background

Scope of Work and Deliverables

Profile of the Gender Training & TA Team

Multi-Sectoral Collaboration among the Gender IQC Organizations

2004 Gender Assessment Report

Building On the Current Foundation for Gender

Overview of Training & Technical Assistance

Background: The USAID Mission in South Africa demonstrated an extraordinary commitment to integrating gender in its programs, as well as increasing the awareness of gender issues among all Mission personnel, including support staff members—people who might not always consider gender as a priority in their work. More than 100 staff members from Strategic Objective (SO) teams, regional teams, and support offices attended 16 different sessions on gender awareness, gender skills, and facilitated working sessions.

The current 2005 Gender Training & Technical Assistance (TA) activities represent the third stage of this significant commitment. Early in 2004, three Mission staff members, including the current Gender Focal Point (GFP) and two members of the Gender Action Team (GAT), attended a regional gender training in South Africa under the Gender Indefinite Quantity Contract (IQC). Then, in August 2004, a three-person Gender Assessment Team visited the Mission and various partner projects throughout South Africa. Their recommendations led to the current 2005 Gender Training & Technical Assistance.

Scope of Work and Deliverables: Three deliverables were requested:

(1) Targeted training for each SO team, helping them to understand the differences between “gender as a technical variable” and “gender as an equity issue,” working with sex-disaggregated objectives and indicators, and identifying sector specific resources.

(2) Facilitated working sessions leading to sector-specific Action Plans, based on an update of the 2004 Gender Assessment Report recommendations and new activities and priorities.

(3) An overview report on key sector issues, including work on sector-specific indicators, conclusion and recommendations for further development of the Mission’s Gender Action Plan as per Automated Directive System (ADS) requirements and the multi-sectoral dimensions of gender issues.

Profile of the Gender Training & Technical Assistance Team: This four-person team spent three weeks at the Mission, again reflecting the significant commitment to gender by the Women in Development (WID) Office and USAID/South Africa. The team brought to the task more than ten decades of experience in international development. Master-level trainer David Omambia from Kenya brought significant experience in community-based health care, agriculture, and development throughout Africa, with a special emphasis on institutional gender mainstreaming. Dian Svendsen, also a master-level trainer with more than 30 years in adult education and organizational development, brought vast experience with integrating gender into all sectors in Africa and Asia. Attorney Susan Somach contributed the grounding in USAID procedures and practices, having served as the GFP for USAID in Russia and consultant for a number of the Gender Assessments in Missions worldwide under the Gender IQC. Team

Leader Maggie Range, a master-level trainer, currently serves as a Senior Technical Advisor with Dev-Tech Systems Inc. under the Gender IQC and is charged with the creation of gender and sector training materials for the USAID website. All team members had previous experience in South Africa.

Multi-sectoral Collaboration among the Gender IQC Organizations: This Gender Training & TA Team came under the auspices of DevTech Systems and met with all sectors in the Mission. However, prior to departure, the team consulted with Gender IQC partners—the EQUATE team (MSI) and GATE (DTS)—who are specifically addressing the education and economic growth SO Teams and exchanged training materials, resources, and experiences. Materials from the EQUATE education group at MSI were distributed to both education and health teams, especially with regard to Orphans and Vulnerable Children (OVC). Also during this period, Richard Strickland from the USAID Africa Bureau worked with the Mission SO teams to refine their inputs to the new strategy.

The 2004 Gender Assessment Report made three general recommendations to the Mission:

(1) Targeting gender training and preparation of an inventory of materials for distribution to staff, (2) a plan to establish a baseline of relevant sex-disaggregated statistics and to analyze the sex-disaggregated statistics it is collecting, and (3) ways for each SO team to address gender-based violence (GBV) as a crosscutting priority as new programming opportunities arise.

Implementation of the 2004 Gender Assessment Recommendations: Training has now been delivered; all sectors are collecting and most are analyzing sex-disaggregated statistics, and DevTech provided 100 CD-ROMs of gender resources, both general and sector-specific. An updated CD-ROM will be available by April 2006. Teams are also addressing GBV in their Action Plans.

Building on the Current Foundation for Gender: Currently, a positive foundation exists for integration of gender issues for both sexes into USAID South Africa work:

- √ *Policy:* The South African Government (SAG) policy framework promotes gender equality. The Strategic Framework for Africa says gender is a cross-cutting theme, and the draft Mission Order: Integrating Gender into USAID/South Africa's Program Portfolio establishes procedures and mechanisms to ensure effective integration of gender issues.
- √ *Receptive Framework:* The Mission Front Office has made a strong commitment to integrating gender, and a critical mass of gender-trained staff is forming. Three key people have participated in regional gender training, and three others have extensive experience with gender, an academic degree in gender, or have conducted gender training courses.
- √ *A Mission-wide Gender Assessment* was conducted in August 2004, with specific recommendations made to teams.
- √ *Resources & Internal Mechanisms Established:* The GFP has been in place for three years, and the Gender Action Team was established in 2004. These members are building capacity through meetings, outside seminars, and exchange of information. Extensive

gender resources already exist and are regularly updated on the “public” P drive (P: gender). Gender materials also reside in the GFP office and in individual SO offices.

- √ *Adherence to ADS:* Most teams are already collecting and reporting sex-disaggregated statistics, and many have begun analyzing the statistics for gender factors.

Overview of Training & Technical Assistance: Over the three-week assignment, the Training & TA Team provided several types of training and technical assistance to more than 100 staff members, 39 men and 64 women.

1. Preparatory meetings (30-60 minutes) took place with each SO team, regional team, and technical support offices. During these meetings, the Mission staff completed (1) self-assessments of their gender knowledge, (2) self-assessments on the collection, analysis, and utilization of sex-disaggregated statistics, (3) the support offices explored the relevance of gender to USAID work, and (4) the SO teams reviewed the specific 2004 sector recommendations. These meetings helped refine the training designs that were tailored to specific group needs.

2. Gender Awareness Training for the regional and support staff (3-hour sessions)

Gender Basics

- Relevance of Gender to USAID and staff
- Preview of A Gender Tool & Exercise to Think About Gender in Projects

3. Gender Skills Training & Action Planning for the SO teams. (9-hours of facilitation)

Gender Skills Training & Facilitated Working Sessions:

- Identifying Gender Considerations in the Project Cycle
- Categorization of Project Results by Gender Equality
- Identification of Sector Gender Issues
- Review & Revision of 2004 Gender Assessment Recommendations
- Development of SO Action Plans (6 hours for these last three steps)

During the course of the training, the team added a segment on Conducting Participatory Evaluations, especially appropriate for reviews with and by partner organizations. In addition, follow-up meetings were held as needed with individual sector members and the GFP, as well as members of the GAT, Human Resources, and various individuals from the regional teams, and support offices. At the conclusion of the training sessions, the Gender Training & TA Team provided a three-hour debriefing session for the Front Office and a 30-minute open debriefing for Mission staff.

II. METHODOLOGY

The Training Approach
The Training Design & Primary Tools for Sector Analysis
Monitoring and Evaluation

Learning is not that one knows more, but that one behaves differently.
– John Dewey

The Training Approach: Helping Mission staff learn -- and remember -- to ask the right questions about gender was the foundation of this Team’s approach. It is a simple approach designed to maximize long-term learning and to respect the time constraints of Mission staff. The approach of the training design makes one important assumption:

Gender is recognized as a significant -- indeed, often critical—factor in a project. However, it is rarely the exclusive focus of any project, but rather an important element that can spell success or failure in achieving results and sustainability.

As much as possible, the training sessions utilized adult education methods and participatory learning. This approach is based on the origin of the word “education,” which comes from the Latin “educare” (“to draw out”). It is designed to foster long-term learning that begins to change behavior.

The Training Design & Primary Tools for Sector Analysis: The core of the training design focused on the two ADS strategic questions (paraphrased):

Gender as a Variable: How do gender factors affect project success at every stage of the Project Cycle—needs assessment, design, implementation, monitoring, evaluation—and the ability of a project to be sustainable while meeting project goals, targets, and objectives?

Gender as an Equity Issue: How do project results affect the relative status and power of women and men and the achievement of gender equality?

Throughout the training, the emphasis was on gender issues and stereotypes as they affect both sexes, and the belief that development professionals can best improve conditions for one sex by consideration of the impact on the other sex. The active involvement of both men and women is central to finding solutions to such development issues as HIV/AIDS.

To address Gender as a Variable, the Team used a new tool, The CRIB Sheet:*

The CRIB Sheet: The Team developed a simple CRIB Sheet to help Mission staff remember the critical questions to ask in their various planning, implementation, and evaluation processes. This new tool represents an easy-to-remember synthesis of major gender analysis tools. It is designed to help trigger questions about gender when staff members are working at any stage of the Project Cycle.

While the CRIB Sheet was developed with the gender variable in mind (ADS Question #1 above), these questions can also bring to light other socioeconomic variables that might impact

program success. The CRIB Sheet tool can be broadly used by reminding people of four simple areas of questions to ask that might affect any stage of the Project Cycle.

Cultural Roles & Practices
Rights and Resources
Involvement
Benefits

**Crib Sheet (slang): a piece of paper with answers or notes used to prepare for an exam.*

To examine project results for effects on gender equality, the Team used this exercise:

Categorizing Project Results by Gender Equality: Derived from the Gender Continuum tool sometimes used in the health field, this exercise consisted of an analysis of project results in terms of three questions: Do the project results:

- (1) Make Gender Equality **Better**¹ in terms of relative status or power between the sexes?
- (2) **Accommodate** the status quo with some gender inequalities (usually for cultural reasons beyond the manageable interest of USAID) while improving conditions for one sex?
- (3) Make gender equality **Worse** for either sex?

Participants practiced with numerous short but complex examples from a variety of sectors that generated lively group discussions.

To learn the difference between sex-disaggregated statistics and gender data:

Addressing Sex-Disaggregated Statistics: The Team focused on illustrations of sex-disaggregated statistics and why they are often insufficient without further gender analysis. In various sectors, they discussed how parity may not lead to gender equality for women and men, and also how parity may not lead to achievement of sector specific goals. One example cited a sports arena with an equal number of toilets for males and females. While this is parity, it is not gender equality because it does not analyze the results for gender equality or the gender factors--the biological differences, the differing needs, the cultural factors, time resources, and the ways in which males and females use the facilities. Failure to apply gender factors to every stage in the Project Cycle or to analyze the reasons for the differing and relative results for men and women in most cases can lead to critical omissions for gender equality.

Monitoring and Evaluation of the training took two forms:

Pre- and Post-Assessment of Mission Gender Experience and Understanding: Participants completed a baseline self-assessment of gender knowledge at the beginning of the training and, again, at the conclusion. For the most part, these self-assessments indicated considerable growth in understanding of gender as a concept and its impact on projects. In a few cases, participants

¹ In the process of testing category titles, some sessions in South Africa used other terms, such as Reinforcing Gender Inequalities or Transforming Gender Inequalities. The original Gender Continuum developed for the USAID InterAgency Gender Working Group (IGWG) utilizes the terms: Exploitative, Accommodating, Transforming. The terms Better, Accommodate, and Worse are an attempt to simplify the field of gender analysis for a broad spectrum of Mission personnel.

already familiar with gender gained less new knowledge from the Overview sessions. A Summary is available in Appendix I.

Evaluations took place in each session, and they varied in complexity according to the job assignments of the participants. Results were shared with each team. (See samples in Volume II, Section III of this report).

III. TEAM & SECTOR REPORTS

Democracy & Governance and Local Government Services Sectors (SO1 and SO6)
Education Sector (SO2)
Health Sector (SO3)
Economic Growth Sector (SO4/SO9)

Each SO team developed the following reports on gender issues in their sector and used the 2004 Gender Assessment recommendations as the basis for development and refinement of their new Action Plans. More complete reports and charts of the Action Plans appear in Volume II, Section II Sector Reports. Most SO team members participated in developing these recommendations, and the draft of the sections was sent to each team for review.

DEMOCRACY & GOVERNANCE SECTOR (SO 1)

Gender Issues in Democracy and Governance (DG): The SO1 team highlighted five major issues:

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

See Volume II, Section II of this report for additional information.

**The Democracy and Governance Team
ACTION PLAN RECOMMENDATIONS**

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

LOCAL GOVERNMENT SERVICES SECTOR (SO6)

Gender Issues in Local Government Services: The SO6 team highlighted four major issues:

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

See Volume II, Section II of this report for additional information.

The Local Government Services Team ACTION PLAN RECOMMENDATIONS

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

Synergies, Challenges, and Gender Issues for DG and LGS

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

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

EDUCATION SECTOR (SO2)

Gender Issues in the Education Sector: The SO2 team highlighted four major areas:

- Impact of HIV/AIDS on teachers, students, and communities.
- Increasing access to quality education for both boys and girls.
- Gender-based violence directed at both boys and girls.
- Building capacity of teachers regarding attitude and behavior change.

See Volume II, Section II of this report for additional information.

The Education Team ACTION PLAN RECOMMENDATIONS

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

HEALTH SECTOR (SO3)

Gender Issues in the Health Sector: The SO3 team highlighted four areas:

- Exploring opportunities to more effectively integrate gender into health service delivery.
- Increasing male involvement in community-based caregiving and improving their health-seeking behavior for TB and HIV/AIDS.
- Providing tools to community-based care partners (NGOs) to incorporate gender in activities and to analyze and use sex-disaggregated statistics in identifying gaps in service delivery.
- Incorporating GBV interventions in selected programs.

See Volume II, Section II of this report for further information.

The Health Team ACTION PLAN RECOMMENDATIONS

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

ECONOMIC GROWTH SECTOR (SO #4 & SO #9)

Gender Issues for the Economic Growth Sector: The sector teams highlighted three areas:

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

See Volume II, Section II of this report for additional information.

The Economic Growth (EG) Team ACTION PLAN RECOMMENDATIONS

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

The Regional HIV/AIDS Program Team ACTION PLAN RECOMMENDATIONS

1. Continue to strengthen institutional partners' capacity for gender integration, including: (a) Identify gender strengths and weaknesses of implementation partner work plans, (b) conduct gender training at a partners' monthly meeting, (c) incorporate gender in organizations' program descriptions (Pact), and (d) disaggregate statistics in the annual reports.
2. Look for opportunities to integrate gender in the Performance Monitoring Plan (PMP) process and reporting to OGAC.
3. Mainstream gender in the Five Year Strategic Plan for Swaziland and Lesotho.
4. Increase Regional HIV/AIDS Awareness Program (RHAP) team awareness and capacity for gender integration.
5. Influencing Development regional gender sensitive policies to support human resource development.
6. Check on CEDAW (UN Convention to End Discrimination against Women) status in Lesotho and Swaziland, including Gender Plan of Action and periodic reporting.
7. Identify CBOs in Lesotho and Swaziland that have a solid reputation on gender and find ways of supporting them to become gender champions.

OTHER TEAMS & OFFICES

The Gender Training & TA Team conducted three-hour Overview and Gender Awareness training for other support offices and regional staff (RHAP, OFDA, FFP, RIG); some offices were combined in these sessions. In general, enthusiasm and interest by the end of the sessions was unexpectedly high. The Executive Office, Finance, and OAA asked for additional discussions and gender resources that are relevant to their work. The Gender Focal Point attended many of the overview sessions, and the backstops participated in some of their assigned SO team's sessions.

Program and Project Development Office (PPDO): PPDO staff members were joined by the newly arrived Contracting Officer who missed the OAA session. The Project Cycle discussion focused on the various roles that PPDO staff fulfill in integrating gender: strategy planning, activity planning and approval, procurement (RFA/RFP/APS, and review/selection process), extensions/modifications, backstopping, evaluations and assessments.

Other Offices Who Participated in Gender Overview Training: Executive Office, Financial Management, Office of Acquisition and Assistance (OAA), Regional Inspector General's Office, Office of Foreign Disaster Assistance (OFDA), Food for Peace.

IV. RECOMMENDATIONS & OPTIONS FOR NEXT STEPS

How to Systematically Integrate Gender into the USAID South Africa Mission

The Gender Training & TA Team examined the overall Mission and ways that gender is or could be systematically integrated to a greater degree. Just as individuals and teams reflect on experiences and learn by taking in information, so can organizations. Many organizations, such as the South Africa Mission, take in and disseminate gender information, but many do not systematically interpret the information in ways that can lead to institution-wide integration. The following model illustrates the steps in a gender-focused organizational learning cycle that leads to gender-sensitive actions:

- An organizational climate that creates and sustains gender integration.
- Mechanisms in place to generate or capture gender experiences and information.
- Opportunities for individuals to see the relevance to their work.
- Staff ability to analyze, interpret or make meaning of the information.
- Increasing responsible action.

The Gender Team worked with the Gender Focal Point person to analyze gender integration within the USAID South Africa Mission with an organizational learning perspective. The Mission seems to be progressing well in terms of creating a positive atmosphere and in widespread distribution of gender information. However, there is room for improvement in integrating and interpreting gender information throughout the Mission. In some cases the mechanisms exist, such as the GAT, but increasing their effectiveness is the organizational challenge. Additional sustainability may be ensured through the commitment of the Front Office and the assistance of the PPDO staff, the Gender Focal Point, and the Gender Action Team. The draft of a “worksheet in progress” (Volume II, Section II) may provide further guidance on how the Mission can help ensure systematic integration of gender.

Time Constraints Viewed As Barrier to Gender Integration

Time constraints are widely viewed as a barrier to integrating gender in the organization’s day-to-day work. If gender is seen as a separate activity, staff members are less likely to give time for it. Some staff members said, for example, that it was faster to ask the Gender Focal Point than to access and search the P: drive for resources, which relates to how gender information is integrated in the Mission.

One element of the situation may not be time itself, but the view of gender as a discrete rather than integrated task. Race analysis is often seen as a critical element for project success in South Africa. When gender, too, is collectively seen as relevant to work—and to project success, the gender lens will become routine, automatic, and integrated into the organizational culture. Therefore, it is crucial to keep gender visible in ways that staff members find easy, simple and meaningful to their work.

Role of the Gender Action Team (GAT)

The Gender Action Team can play a pivotal role in the receiving and dissemination of gender information throughout the Mission, with the pro-active support of the GFP. Because each GAT member represents a link to a team, the potential for providing the teams with new gender information, ideas, and even technical assistance is significant. However, information going to the GAT must also be for the most part simple, readable, and easy to use and transmit to others.

With backup from the WID Office, the Gender Focal Point can continue to pass on short forms of gender information through and to the GAT team for distribution among sector teams and other Mission staff. However, it must be noted that gender is only a part of the portfolio for the GFP, so seeking out and distributing information must be a collective effort. The GFP receives various ideas and information, and she can cull and forward short materials to the GAT while recognizing other demands on her time.

The GAT membership ranges from volunteers who serve because of an interest in gender to other members who are assigned. Few senior-level people serve on this committee. Hence, the influence of GAT members on their teams also varies. All current members are female, reinforcing the stereotype that gender is about only women. Members' knowledge and experience with gender varies, and GAT members expressed a need for on-going learning about the topic so that they could be more helpful to their teams.

RECOMMENDATION #1

Institutionalizing Gender: Keeping It Visible

The Mission could consider using the organizational learning process (and worksheet) as an additional systematic approach to integrating gender throughout the Mission. (See Volume II, Section II, Organization Learning Worksheet.) While institutionalizing gender to a greater degree, the Mission also recognizes that development and sector objectives are primary, with gender as a critical cross-cutting theme, along with HIV/AIDS and Gender-Based-Violence (GBV), all of which can affect the success or failure of meeting the primary objectives.

- ⇒ Continue to build a receptive environment for sustaining gender integration. The best suggestions will come from Mission staff themselves and from GAT members, which will indicate their continuing interest and commitment. For example, some suggestions that arose:
 - A semi-annual, "Where Are We with Gender?" Day.
 - Gender as an automatic "check-in" item on the agenda of each team's staff meetings.
 - Develop a laminated poster of the (1) CRIB Sheet questions or (2) the ADS strategic questions about gender factors and results for the walls of program staff.
 - Sector staff or the GAT could continue to brainstorm ways to keep gender for men and women visible now that the gender training is fresh in the minds of many staff members.

- ⇒ Disseminate gender-related experience and information. For example:
 - Circulate short weekly gender tips, stories, ideas, or quick examination of the one-paragraph Categorization examples with analysis. (DevTech already has approximately 70 of these examples in progress.)
 - Compile a list of sector-specific, regular Internet gender newsletters with short items and issues that could be distilled and circulated through the GAT.

- To ensure use, keep most of the disseminated gender information short and easy to read.
 - Include gender tips and ideas on the computer system, similar to security tips.
 - Have the Gender Focal Point consult with the Deputy Mission Director (DMD) and explore the idea of installing gender tips that flash on the computer screens.
- ⇒ Integrate gender-related information and experience into the Mission. For example, consider having the Gender Focal Point attend semi-annual sector meetings to assist with reviews of the Gender Action Plans developed during the past month.
- ⇒ Collectively interpret gender-related experience and information. For example:
- Use events such as staff retreats as a time to reflect on gender-related information.
 - Explore setting aside time at the annual partner meetings for gender training by Mission staff using some of the materials used in this TDY.
- ⇒ Initiate new actions (based on learning) and monitor changes. For example:
- Continue monitoring the Gender Action Plan and agreed-upon actions during the gender training.
 - Monitor gender performance in the Performance Indicator Reference Sheets (PIRs).
 - Explore ways for the team leaders and GAT members to include gender in Work Objectives.

RECOMMENDATION #2

Increase Partner Capabilities in Gender

One commonality among the teams highlighted the need for partner organizations to increase their capacity to integrate, to analyze gender factors in their projects, and to analyze and use sex- disaggregated statistics and gender data. These needs could be met in several ways, but providing them with practical materials with some suggestions could help. The Mission works with more than 200 South African partner organizations, so sharing materials and training ideas could have a broader impact if done in a targeted and useful manner.

- Identify partner organizations that could provide gender training or technical assistance.
- Support/provide gender training for partner organizations.
- Disseminate the materials from the 2005 Gender Training & TA to partners. (See Volume II, Section III on Training Models, Materials, & Tools.)
- Distribute the handout on Gender Tips for Organizing or Conducting Training Programs. (See Volume II, Section III)
- Send out the lists of resources that were distributed during the gender training, such as available gender training manuals and materials that can be downloaded from the web.
- Keep in touch with the WID Office on the development of new training materials by contractors under the Gender IQC.

- Communicate with the WID Office about specific partner needs for materials that contractors may be developing, similar to the Gender Tips for Training Programs. (Volume II, Section III)

RECOMMENDATION #3

Continue Staff Learning about Gender

See the above section for ideas that also apply to staff, using the GAT members as a mechanism.

RECOMMENDATION #4

Strengthen the Gender Action Team

As noted earlier, the GAT can play an absolutely pivotal role in keeping gender visible in all the teams, but some of their influence will depend upon the team leaders and the climate for gender integration. As an important clearinghouse for gender information, GAT could analyze how it best wants to receive and disseminate this information throughout the Mission and in what form. (Use of text in emails, attachments, length of information, PDF files, etc. can be the deciding factor in whether information is read. GAT members could survey their own team members.)

In addition, GAT members could devote a session to how they can best increase their own understanding and skills since the gender expertise varies considerably among the members. (See the section on Partners above and explore the options in Appendix III: Training Models, Materials, & Tools.) Other suggests that come from discussions with current and former GAT members and, also, from the Gender Training & TA Team:

- ⇒ The Mission could explore ways to increase the prestige of this group and make a strong effort to include men among the members so that it could be a more accurate representation of the Mission. Difficulty in juggling time, travel commitments, and meeting times has restricted GAT momentum in the past. One option could be to request that each team name two members to serve as alternates, which could better, ensure team representation at each GAT meeting. At least one member should be a technical person. From the teams where this is possible, the ideal would be to have a man and a woman who could also serve as positive role models of men and women working in partnership to ensure gender integration. There should also be consideration of a diversity of American and foreign national staff among its membership. Finally, team leaders could demonstrate their commitment by appointing people with an interest and a pro-active commitment to serving in this liaison role between their team and the GAT.
- ⇒ The central message emanating from the GAT could be that gender factors, roles, and stereotypes that affect projects involve and affect both sexes, not only women.
- ⇒ All the recommendations listed above for increasing partner capacity should also apply to the GAT members. The Gender Focal Point can continue to sort out the key materials so that members are not overwhelmed. GAT members could schedule another review of the materials on the P: drive, as well as investigation of materials on the CD-ROMs brought by DevTech. Having members undertake this task, rather than the Gender Focal Point, will accelerate learning in itself.

- ⇒ The Gender Focal Point might explore the existence of regular listserv exclusively on gender and the individual sectors.
- ⇒ Circulate short weekly gender tips, stories, ideas, or quick examination of the one-paragraph Categorization examples with analysis. (DevTech already has approximately 70 of these examples in progress.) See the Appendix on the GAT for additional ideas.
- ⇒ Compile sector specific gender listserv resources with gender stories and issues that could be distilled and circulated through the GAT, such as the Interagency Gender Working Group (www.igwg.org) that provides brief weekly articles on health and gender from around the world.