



Gender and Education A Selection of Practical Tools

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1. Background

Action Aid, A Fair Chance: Attaining Gender Equality in Basic Education by 2005, March 2003

Action Aid Global Campaign for Education

http://www.oxfam.org.uk/what_we_do/issues/education/downloads/gce_afairchance_full.pdf

This report provides a detailed analysis of the gender education gaps, why fewer girls attend school worldwide and what may be done about it. It is aimed at a wide range of stakeholders, including donor agencies and governments trying to find strategies to combat the gender gap. Some countries are already making the required effort to reach the education goal by 2005. Bangladesh for example, has raised girls' secondary enrolment rate from 13 per cent to 56 per cent in 10 years. The report concludes that a comprehensive strategy for achieving gender equality in education should:

- End the “education queue”. Governments and donors need to build enough schools, hire enough teachers, remove school fees and rapidly extend free and universal access to secondary schools.
- Offer extra help for poor families to keep girls in school. Extra assistance, such as a free school meal, or stipends linked to regular attendance, helps poor families keep girls in school for longer.
- Launch a rescue plan for schools in poor communities. Where attendance, particularly of girls, is difficult to maintain due to perceived costs or violence in schools, a first priority should be improving the status, pay and support of teachers, especially those teachers posted to rural or “difficult” areas.

Compiled and adapted from ActionAid Media Brief

Rose, P. and Subrahmanian, R., Evaluation of DFID Development Assistance: Gender Equality and Women’s Empowerment, Phase II Thematic Evaluation: Education, February 2005

<http://www2.dfid.gov.uk/aboutdfid/performance/files/wp11.pdf>

This is one of a number of papers written in preparation for a full DFID evaluation of its gender equality work. It reviews the framework, country commitments and multilateral cooperation in the field of education – and outlines the reasons for failure to reach parity in primary education by a large number of countries in South Asia and sub-Saharan Africa. It then goes on to review the strategies that have been developed to address these challenges – acknowledging that a combination of approaches will be required depending on problems faced in a particular context. The evaluation looks at understandings of gender equality, aid modalities for gender equality in education and indicators for impact assessment of DFID work. It concludes that the narrow focus on the Education Millennium Development Goal (parity in primary education) fails to address wider concerns of post-primary learning as outlined in the Education for All agenda. It also points out that the proportion of DFID’s education expenditure on programmes with a gender element has declined and that Country Assistance Plans consider gender equality issues in separate policies rather than *within* education policies themselves. It recommends better engagement with multi-stakeholder processes such as UNGAI and PRSPs. It also advocates new approaches to drawing up strategy documents and monitoring plans.

Sweetman, C. (ed.) Gender, Education and Training, 1998
Issue of *Gender and Development* journal, Oxfam

<http://publications.oxfam.org.uk/oxfam/display.asp?isb=0855984007&TAG=&CID>

This collection of articles by development workers and researchers focuses on learning opportunities for women offered by education and training. Written for a wide audience including researchers, policy-makers, development practitioners and education specialists, they reflect on the causes and consequences of the continuing imbalance in educational participation, and argue that equal access to existing services is not sufficient to make education empowering for women. The collection includes writing on formal and informal education, including popular education and skills training. The articles look at the social context of education in which social norms influence access and retention of girls. Some examine the financial barriers which result from cuts in social spending associated with structural adjustment. Others look at the implications of perceived 'modernisation' or westernisation' on women and girls' opportunities. There is discussion of the language of empowerment and how its relationship to education is not automatic and is often ambiguous. The collection concludes that education for transformation is not simply a case of access or training, but of awareness-raising which leads to questioning existing power structures. This is a complex process requiring strategies which challenge gender stereotypes but which also remain closely relevant to people's lives.

UNESCO, Gender and Education for All: The Leap to Equality, November 2003
EFA Global Monitoring Report, UNESCO Publishing

http://portal.unesco.org/education/en/ev.php-URL_ID=23023&URL_DO=DO_TOPIC&URL_SECTION=201.html

This report from UNESCO's Education for All (EFA) initiative provides a good background for understanding why girls' education is important, both in terms of upholding human rights as well as broader benefits to society. It is addressed to a wide range of stakeholders, but most importantly to governments attempting to reach the Millennium Development Goal of gender parity in education. Parity itself is still far off in most countries, and more deep-seated changes in the areas of equity of opportunity and gender-aware curricula are rarely even on the horizon. The report looks at education as a human right enshrined in international treaties and conventions that are legally binding. It identifies three areas in which girls' rights to education are being denied:

- the right to access –through early marriage, conflict, the need to work and school fees;
- rights within education – gender bias in teaching methods and learning environment; and
- rights through education - how performance and achievements translate into social and economic opportunity.

Good practice in legislative reform and policies on gender equality could include:

- the introduction of scholarships
- income-support schemes
- gender-aware curricula and teacher-training
- recruitment of women teachers
- bridging courses for girls starting their education late.

A further two sections of the report deal specifically with national education targets and international commitments and it concludes by calling for the use of a gender lens to ensure all people benefit from aid for education.

Wible, B., Making Schools Safe for Girls: Combating Gender-Based Violence in Benin, 2004
The Academy for Educational Development.

This report highlights concerns of gender-based violence (GBV) faced by girls in school, with a focus on case studies from two large provincial towns in Benin. Participatory learning and action techniques (PLA) were used in conjunction with interviews and workshops with students and their families. It is aimed at policymakers to provide more information on this growing problem, along with strategies to combat it. While not exclusively or even predominantly an African issue, evidence suggests that sexual harassment in schools is a growing problem across the continent. Both boys and girls are victims, but groping, bullying, verbal abuse, and rape are most often suffered by girls and young women. Sexual violence and harassment of girls is a direct cause of underachievement, dropout, damage to physical and psychological health, early and unintended pregnancies, and STI transmission, including HIV/AIDS. This study focuses on teacher-student harassment, both because of the impact it has on schools and because Beninese students identified teachers as most often responsible for the harassment they experience in the school environment. While highlighting a phenomenon that undermines girls' education, this study does not seek to demonise schools or teachers, but rather seeks to emphasise that schools are not always safe havens from gender-based violence and that gender-based violence at school undermines girls' academic enrolment, achievement, and retention. The research conducted with students and their parents revealed that parents' recognised that cultural practices such as forced marriage may contribute to ongoing problems with GBV, as well as the need for school policies that encouraged girls to speak out rather than feel ashamed. Other recommendations include improving community education about children's and youth rights and establishing a confidential, effective complaint procedure for students.

The document is available in English and French – electronic copy available.

2. Approaches

DFID, Girls' Education: Towards a Better Future for All, January 2005
DFID Policy Paper

Full version: <http://www.dfid.gov.uk/pubs/files/education/girls-education-full-final.pdf>

Summary version: http://www.ungei.org/docs_resources/girlseducation_summary.pdf

This paper describes DFID's planned actions to support work towards the education and gender Millennium Development Goals by 2015. It is aimed at donor agency staff UN agencies and civil society organisations, providing a background to the challenges facing girls' education and how donors might work together better, in conjunction with other groups including civil society, to improve girls' enrolment in education around the world.

It argues that progress in girls' education has been hampered by a number of factors:

- a lack of international political leadership;
- a global funding gap of an estimated \$5.6 billion a year for education;

- lack of plans and capacity within national education systems to improve the access to and quality of schooling for girls;
- the existence of many poor families who cannot afford to send their children to school.

The paper is divided into three main sections:

Constraints to girls' education: donors need to support countries' own national strategies in overcoming the constraints to girls' education.

This includes ensuring the following:

- communities, parents and children can afford schooling
- girls have access to a safe school environment
- society and parents value the education of girls
- children who are excluded due to conflict have access to schooling
- girls are not disadvantaged on the basis of caste, ethnicity, religion or disability.

Tackling girls education

DFID will support governments to:

- strengthen political leadership and empower women
- make girls' education affordable
- make schools work for all girls; and
- will also support NGOs, religious and other voluntary organisations.

The international community needs to speed up its efforts to support countries that have the largest number of girls out of school

International efforts need to focus on:

- raising additional resources and directing them to where the need is greatest
- improving the way resources are directed to countries so that they have the greatest possible impact
- strengthening key international organisations to provide more leadership on girls' education and better support at the country level.

Summary adapted from Eldis

**Fiedrich, M. and Jellema, A. with Haq, N., Nalwoga, J. and Nessa, F., Literacy, Gender and Social Agency: Adventures in Empowerment, September 2003
Research Report for ActionAid UK**

<http://www.dfid.gov.uk/pubs/files/litgenemp-edpaper53.pdf>

This study of participatory development is an analysis of four participatory adult education projects in Bangladesh and Uganda. It focuses on 'Reflect', an approach to participatory adult education that aims to stimulate a wider process of change in individuals and communities. It is aimed primarily at practitioners, particularly those working in or with donor agencies, to recognise the limitations and potential problems of placing too much emphasis on participatory methods without appropriate reflection on the methodology itself. It looks at why the projects were introduced, what was expected of them and how people perceived their activities. Participatory methodologies can reinforce top-down, 'western-centric' development models and it is misguided to expect participants to easily challenge long-standing ideas of power and progress. Many participants in the projects said that it was more important to them to gain status and respectability through better engagement with existing systems of participation. In this way small but important gains for many individual women were made through *Reflect* such as

discussion and communication skills and the ability of women to increase their status as a result of being educated. The report concludes that there is a need for more evaluations to be undertaken to move away from employing participatory programmes for their own sake.

**Herz, B. and Sperling, G.B., What Works in Girls' Education, 2004
Council on Foreign Relations**

http://www.cfr.org/pdf/Girls_Education_full.pdf

This paper summarises the most promising approaches to increasing girls' enrolment and educational quality. It also presents a wide range of data strongly supporting the need for governments and other stakeholders to invest in girls' education. It is aimed at policymakers and their staff and provides a list of 'what works' to educate girls, namely:

- making girls schooling affordable, either through direct fee reductions or through scholarships and grants;
- building local schools that are close to girls' homes, and which encourage involvement of the local community and provide flexible scheduling;
- making schools more girl-friendly, which may include providing separate latrine facilities, ensuring privacy and safety in line with cultural requirements and discouraging stereotypes of girls in teaching;
- ensuring high quality in education - sufficient teacher-training, smaller class-sizes and adequate supplies of books and other materials.

To achieve these conditions, political will is needed at the country level to invest in girls' education. Comprehensive national education strategies that are backed up by budgetary provisions are crucial for plans to become a reality and commitment is needed from donors to ensure that political as well as financial resources are made available.

**Rao, N. and Smyth, I., Partnership for Girls Education, December 2004
Oxfam Report**

http://www.oxfam.org.uk/what_we_do/resources/downloads/partnerships_for_girls_education_full.pdf

The idea of partnerships – involving multinational donors, governments, international non-government organisations, the private sector, civil society, and local communities – is increasingly current in debates about development. They are widely seen as the most effective way to achieve sustainable economic and social benefits for the poorest people.

This book provides insight and analysis into the benefits and limitations of partnerships for furthering goals of improving girls' education. It is aimed at a wide range of stakeholders engaged at multiple levels around the world who are attempting to use partnerships as a way of forwarding a more equitable educational agenda and achieving the Millennium Development Goals. Published by Oxfam, it attempts to capture a wide-range of perspectives on the issues at hand.

How does this vision translate into reality for education services? In particular, what types of partnership are most likely to increase opportunities for girls and women, millions of whom are excluded from education? Can innovative local initiatives be scaled up without losing the community involvement that made them so successful in the first place?

The book documents and analyses the achievements and challenges of actual partnerships for girls' education. An account of the formation and development of the Global Campaign for

Education is followed by detailed case studies from Bangladesh, Egypt, the Philippines, Peru, and sub-Saharan Africa, illustrating a wide range of partnerships and raising crucial questions about power and control, scaling up, and sustainability. By setting global, regional, national, and local case studies in an analytical framework, this book demonstrates the importance of ensuring that partnerships are not reduced to the lowest common denominator but aspire to the highest standards and broadest visions.

Summary adapted from the Oxfam website.

UNICEF, 2002, Barriers to girls' education: Strategies and interventions

http://www.unicef.org/teachers/girls_ed/barriers_02.htm

This resource from the 'Teachers Talking about Learning' initiative of UNICEF provides a comprehensive overview of barriers to girls' education. Aimed primarily at government policymakers and those charged with the responsibility for implementation of girls' education strategies at the national level, the table outlines the areas of analysis, the possible findings/causes, broad strategies and possible interventions for the following broad thematic areas:

1. Household barriers and family resource levels
2. School level barriers
3. Policy and system-level barriers

Issues that are covered under these themes include

- The direct cost of schooling and how to tackle these including the introduction of scholarships, feeding programmes and the supply of materials;
- The distance from school and managing this through the provision of boarding facilities for girls; and
- Insufficient budgetary allocations for primary and secondary education which require gender-sensitive budget analyses for planning in education

3. Tools and Guidelines

3.1 Gender Analysis

Leach, F., *Practicing Gender Analysis in Education*, September 2003

Oxfam

<http://publications.oxfam.org.uk/oxfam/display.asp?isb=0855984937&TAG=&CID>

Providing accessible tools for carrying out gender-sensitive analyses of current situations, this book includes frameworks for analysing systems, institutions and policies allowing the reader to think through the problems clearly and to develop constructive alternatives. Aimed at policy makers and planners, academics, researchers and students, development agency and practitioners, each chapter presents a tool for gender analysis, and discusses its methodology and its uses, as a means of supporting gender mainstreaming. This book is a companion volume to the Guide to Gender-Analysis Frameworks - a guide to using gender-analysis frameworks in development work. This companion will use four frameworks: the Harvard framework, the women's empowerment approach, the gender analysis matrix and the social relations approach. The frameworks will be applied to the analysis of a variety of educational contexts, including

national education policies and projects, schools, colleges, ministries, teaching and learning materials and school and teacher training curricula. The book provides practical examples of how the tool can be used and highlights their strengths and disadvantages.

Summary from Oxfam website

UNICEF, Conducting a Gender Review in Education: Guidance Note and Tool UNICEF Education Section, Programme Division

This education and assessment tool for conducting gender reviews of education projects is aimed at staff in UNICEF country offices who are responsible for education programmes. It is designed to inform the design, management and implementation of programmes, providing guidance on how to conduct a gender analysis and identify key intervention points using a rights-based, child-friendly, gender sensitive approach. Tables are provided outlining precisely what data is required to complete the analysis, as well as questions and spaces for responses and comments. The tool suggests the collection of the following information:

- gender-disaggregated national and sub-national data
- gender-based examination of quality issues
- the content of education
- teaching and learning processes
- learning environment
- learning outcomes

Electronic copy available.

3.2 Policy-making and Planning for Gender Equality

**UNESCO Asia and Pacific Regional Bureau for Education, Education for All: Guidelines for Preparing Gender Responsive EFA Plans, June 2002
and**

UNESCO Asia and Pacific Regional Bureau for Education, Guidelines for Implementing, Monitoring and Evaluating Gender Responsive EFA Plans, 2004.

Revision of and follow-up to the 2002 Guidelines

<http://www2.unescobkk.org/ips/ebooks/documents/genderEFA/>

These guidelines highlight gender issues to consider in programme planning in the education sector. In the first section, 'Situation analysis and identification of issues' the authors highlight the issues of access, quality and relevance, and management. The second section 'Setting objectives and identifying strategies' encourages all actors in the Education for All (EFA) plan formulation process to be sensitised to gender concerns, and to undertake detailed gender analysis. The third section is on 'Implementation, monitoring and evaluation' and includes suggestions for processes and procedures for implementing gender mainstreaming and possible indicators to consider. More information about ordering is available from http://www.unescobkk.org/ips/orderpubs/op-Education_for_All.htm.

Adapted from summary by Annabelle Newbigging, DFID.

National and Sectoral Policy

Bamberger, M., Blackden, M., Manoukian, V. and Fort, L. PRSP Sourcebook: Gender Chapter, 2000
World Bank

<http://worldbank.org/poverty/strategies/srcbook/gend0814.pdf>

Although poverty is experienced differently by men and women, women's needs are often not fully recognised by conventional methods of poverty analysis and participatory planning. This Gender chapter of the World Bank's Poverty Reduction Strategy Planning (PRSP) Sourcebook is designed to guide those involved in poverty reduction strategy (PRS) at the country level in identifying and implementing policies and programmes that will benefit both men and women, and maximise potential benefits for poor families. The integration of gender analysis into poverty diagnosis and the formulation of gender-sensitive development strategies contribute not only to economic growth and efficiency, but also to equity objectives by ensuring that all sectors of the poor share in programme benefits. The chapter is divided into four sections:

- 1) Integrating Gender into the PRS Processes;
- 2) Integrating Gender into Poverty Diagnosis;
- 3) Defining the Policy Implications of Gender Analysis for the PRS Section;
- 4) Gender Analysis for Monitoring and Evaluation.

Cambridge Education, Mainstreaming gender equality in Sector Wide Approaches (SWAs): Case studies in education, 2000

ODI

<http://www.odi.org.uk/pppg/cape/papers/India.pdf>

<http://www.odi.org.uk/pppg/cape/papers/Uganda.pdf>

<http://www.odi.org.uk/pppg/cape/papers/Ghana.pdf>

This study was aimed to produce practical guidelines on good practice in mainstreaming gender into the planning and implementation of education SWAs. SWAs are a move away from project-focused approaches in educational development and the 'islands of excellence' that these entail, towards the provision of technical assistance within a coherent sector policy. This study looks at the implications of Sector Wide Approaches for the consideration and inclusion of gender concerns using case studies from Ghana, Uganda and India. Interviews were conducted with key stakeholders in donor organisations, governments and civil society groups, and a literature review was conducted. The research was part of a wider programme on gender equality and SWAs co-ordinated by the OECD DAC. The studies concluded that SWAs do have the possibility to further gender equality goals more effectively than project approaches but that they mean closer attention being paid to ensuring a gender perspective in operational and policy frameworks, monitoring and institutional learning. They also point to the need to ensure gender policies do not 'evaporate' and that dissemination processes of lessons learned are vital.

Summary adapted from: <http://www.camb-ed.com/pro24.htm>

Craissati, D., Gender equality in basic education, 2002
UNESCO Working Document

<http://unesdoc.unesco.org/images/0012/001281/128121e.pdf>

This document provides policy-makers in UNESCO and its member states with guidelines for the development and reinforcement of their national plans and programs designed to achieve the objectives of the Dakar Framework for Action. In particular it is intended to assist in the achievement of Goal V, which is the elimination of gender gaps in primary and secondary education by the year 2005, and gender equality in education by the year 2015. The strategic framework proposed in the document expands the notion of basic education to include non-formal education within its scope. The document begins with a conceptual framework and then goes on to assess the change in the situation with regard to non-formal education between 1990 and 2000. The three strategic directions and recommendations are:

1. Working on the linkages between formal and non-formal education systems in order to create diversity and flexibility.
2. The promotion of varying advocacy activities ensuring the contribution of a wide range of stakeholders in policy changes.
3. Provision of support for research and evaluation capacity at the country level.

FAWE, The ABC of gender responsive Education policies - Guidelines for developing Education for All action plans, 2002

<http://www.fawe.org/publications/Handouts%204%20Practitioners/ABC%20of%20Gender.pdf>

How can gender-sensitive education policies be assessed, designed, implemented and monitored? These guidelines designed to support the FAWE's national representatives, address a perceived gap in the technical tools needed in order to carry out gender mainstreaming in national education policies. The publication begins by outlining the principles behind Education for All and how it relates to gender and explaining some of the key concepts behind gender mainstreaming. It then looks at how to do policy analysis of the existing context and how to use this analysis to provide a foundation for action. Finally it lays out the process of planning including strategy, staffing/human resources and funding. This section includes a gender mainstreamed EFA action planning matrix. The guidelines also recommend the participation of local communities in policy development.

Kelly, M. H., Planning for Education in the Context of HIV/AIDS, 2000
UNESCO, International Institute for Educational Planning (IIEP)
2000

<http://unesdoc.unesco.org/images/0012/001224/122405e.pdf>

This booklet is one in a series of educational planning tools published by UNESCO's International Institute for Educational Planning (IIEP). The series is edited and authored by professionals from regions around the world, and represents a wide range of perspectives. This booklet may be used in formal training programmes or private education. It is intended for people engaged in educational planning and administration in both developed as well as developing countries. It may also be used by a less specialised audience, such as senior government officials and policy-makers, looking to gain a general understanding of the link between HIV and education. HIV affects the demand for education, insofar as there are fewer children to educate, whether due to death, lack of interest or expense. It also affects the quality and supply of education, as teachers and other key workers affected by HIV die and are not

replaced. Finally, it affects the resources that can be made available for education. The booklet concludes by calling for a radical re-examination of many of the premises underlying education.

Leo-Rhynie, E. *et al*, A Quick Guide to Gender Mainstreaming in Education and Gender Mainstreaming in Education: A reference manual for governments and other stake holders, 1999

Commonwealth Secretariat Gender Management Systems series

http://www.thecommonwealth.org/shared_asp_files/uploadedfiles/%7B2099C3F9-0AB8-4312-B3DC-B05018BA8D86%7D_qmed_ref.pdf

The purpose of this manual is to provide guidelines for mainstreaming gender into the education sector, in particular the formal education sector (primary, secondary and tertiary education) of Ministries of Education. The manual is designed primarily for use by governments which are seeking to implement gender mainstreaming in their policies, plans and programmes. It is intended for use in the context of a Gender Management System (GMS) - the gender mainstreaming model promoted by the Commonwealth to assist member countries in working towards gender equality and equity in government and civil society. The manual provides an overview of gender issues in the education sector, including global and Commonwealth mandates for promoting gender equality. It examines such traditional indicators as

- literacy;
- enrolment;
- access to education and attainment;
- legal and administrative frameworks;
- the proportions of women in decision-making positions;
- resource allocation;
- curriculum development;
- the organisation of schools and classrooms.

It also examines ways in which gender inequalities are perpetuated through the education system. The manual provides tools for gender analysis and proposes a number of policy interventions which governments may consider adopting, depending on particular national circumstances. It concludes with case studies from Ghana, Jamaica, Pakistan and Zambia. This guide is part of the Gender Management System (GMS), a comprehensive network of structures, mechanisms and processes for bringing a gender perspective to bear in the mainstream of all Commonwealth government policies, programmes and projects. (Available at: <http://www.thecommonwealth.org/Templates/STPDInternal.asp?NodeID=36970>)

OECD/DAC Working Party on Gender Equality, Gender Equality in Sector Wide Approaches, June 2002

OECD/DAC

<http://www.oecd.org/dataoecd/24/17/1956174.pdf>

Because sector wide approaches (SWAPs) involve shaping an entire sector with the objective of enhancing long-term development, attention to gender equality is critical if the SWAP is to be successful in meeting the goal of equitable and sustainable development. Using case studies of the education, health, and agriculture sector, this guide offers advice to policy and operational staff in government and development organisations interested in SWAPs. It aims to ensure that

SWAPs are fully responsive to the needs and interests of both men and women and that they help to promote gender equality. Key challenges and entry points for integrating gender equality actions into sector programmes include: understanding and addressing the underlying conditions that produce unequal access for women and men to services; and conducting analysis of how societal, sectoral and household-level conditions shape the relative opportunities and resources of women and men vis-à-vis the sector. A good example of the latter is the gender analysis undertaken for the Agriculture Investment Programme in Kenya.

**UNESCO, GENIA Toolkit For Promoting Gender Equality in Education, September 2004
UNESCO, DFID and DANIDA**

<http://www.unescobkk.org/index.php?id=322>

The GENIA toolkit provides a collection of practical resources for gender focal points in Asian Ministries of Education (MoE). It aims to build the technical capacity of gender focal points to mainstream gender at national and regional levels. The Toolkit consists of a collection of gender sensitisation and training tools such as the "Gender Equality Donkey" and the "Climbing the Steps: Gender Equity to Gender Equality" visual aid. It also contains the "Gender Lens Series" which is a set of checklists, criteria and evaluation frameworks for "seeing" women's and men's participation, needs and realities more clearly. In this series, there are gender lenses for education projects, for measuring the child-friendliness of schools, for creating curriculum and textbooks free of gender bias, for measuring the gender-friendliness of MoE departments and for measuring the gender responsiveness of community learning centres (CLCs). A network of gender focal points in Asian MoEs was also formed as part of this project.

Donor Policy-Specific

DAW, UNICEF, UNDP, UNIFEM, UNFPA, Resource Guide for Gender Theme Groups, January 2005

http://www.unfpa.org/upload/lib_pub_file/374_filename_resource_guide.pdf

This resource guide was developed by the Task Force on Gender Mainstreaming in the Common Country Assessment and United Nations Development Assistance Framework (CCA/UNDAF) of the Inter-Agency Network on Women and Gender Equality (IANWGE). It aims to provide practical guidance to UN Theme Groups (UNTGs) working on gender equality, focusing on how to more effectively collaborate around women's empowerment and gender equality issues at the country level. It also serves as a tool to strengthen the role of UN theme groups in mainstreaming gender equality concerns and advocacy for women's and girls' rights into Common Country Assessment/UN Development Assistance Framework (CCA/UNDAF) exercises, the Millennium Development Goals (MDGs), Poverty Reduction Strategy Papers (PRSPs) and other coordinated support mechanisms at the national level. Following an introduction to the coordinated support mechanisms, the guide outlines how to establish and manage UN gender theme groups including information on terms of reference, membership, strategies, activities and resources. Gender Theme groups should:

- facilitate cohesive working on gender equality within UN Country Teams;
- coordinate with individual countries' national development goals;

- invest in capacity to produce gender research and statistics as a base to form public policy.

CIDA, Educating Girls, A Handbook: A basic reference guide for CIDA staff in Canada and in the field, 2003

This handbook is part of a knowledge series on education for development intended as tools or resources for CIDA staff in Canada or in the field. The handbook is meant to provide support for field staff, project officers, project team leaders and project directors in implementing CIDA's Action Plan on Basic Education. It recognises the need for practical tools to guide planning, monitoring, and evaluation in an area that is relatively new for many staff. The ideas and concepts contained in this education knowledge series may form the basis for evaluating proposal documents, work plans, and reporting and monitoring at both the institutional and project levels. Girls' education is an area that includes attention to finance, policy, empowerment and the promotion of human rights, women teachers, sexual violence, masculinity, education management, and HIV/AIDS. The document is an important primer for CIDA staff to assist them in working with consultants, project managers, and ministries in partner countries.

This handbook is available from CIDA in electronic and hard copy.

Derbyshire, H., Gender Manual: A Practical Guide for Development Policy Makers and Practitioners

DFID Gender Manual

http://www.siyanda.org/docs_gem/index_implementation/genderman.htm

Gender mainstreaming has been adopted by various players in the development field as a way of ensuring that gender sensitive practice becomes routine in all aspects of an organisation's work, rather than confined to the work of particular staff or specific project interventions. In practice, however, there have been significant obstacles to gender mainstreaming, in terms of organisational capacity and also resistance. As a result, policy commitments often evaporate in programme/project formulation and implementation. This has prompted recognition that the process of developing effective gender mainstreaming strategies is far more complex than was initially thought, and will require a long-term process of organisational change with both technical and political dimensions. Such critical issues are explored in this paper, which also provides recommendations for best practice. The manual is divided into sections on background ideas and concepts, key stages in gender mainstreaming (analysis, influencing the agenda, action and institutions) and includes sector-specific information and case studies.

European Commission, Toolkit on mainstreaming Gender Equality in EC Development Cooperation, 2004

http://europa.eu.int/comm/europeaid/projects/gender/toolkit_en.htm

This toolkit provides information about the EC commitments to integrate gender equality in development cooperation and the methodologies for implementing them. It is an important tool to make sure the European Commission delivers external aid in a way which guarantees women's and men's equal participation in development, both as decision makers and beneficiaries. The toolkit offers guidance and user-friendly tools to be applied at all stages of the cycle of external aid delivery of the European Commission. It comprises four sections:

1. A handbook focusing on the process of aid programming and implementation from the design of cooperation policies and strategies to the actual allocation and disbursement of funds for development programs and projects. The toolkit also provides guidelines on how to work in synergy with partner countries to promote gender equality in sector policies and programs at national level.
2. A series of brief checklists recalling the gender issues relevant for the EC priority areas for cooperation, from policy to project level.
3. A glossary
4. A list of national and international institutions promoting gender equality worldwide.

Summary adapted from website.

**Kane, E., Computer Tool: Girls' Education Designing for Success. Girls' Education: Designing for Success, 2005
World Bank**

This is a tool to help policymakers, planners, educators, researchers, managers and other development specialists to create practical country-led and country-specific plans for educating girls. It is intended to be part of a serious program of planning, to explore issues, perhaps carry out some research, assess and analyse project materials and assemble them in a set of forms that will assist with identifying the issues in the project country or area. It focuses on primary intake, survival to Grade 6 and universal primary completion, but also covers a wider range of relevant indicators, at both primary and secondary level, plus others that educators consider important in reaching gender parity, such as literacy rates, percentage of female teachers, and participation in the labour market. It is divided into steps as follows:

- Step 1: Looking at the Benefits
- Step 2: Identifying Problems in a Country or Region
- Step 3: Identifying Causes
- Step 4: Identifying and Assessing Interventions
- Step 5a: Help with Designing a Project
- Step 5b: Designing Your Project

It is an interactive CD-ROM that uses an Internet-style interface i.e., highlighted words may be clicked on which will take the user to other relevant pages. It also provides a "tools" section, explaining some research tools, the project cycle, sampling, where to look for statistics and working with a consultant to get the information needed for a project.

This tool can be obtained from the World Bank. Contact: istrand@worldbank.org

**Schalkwyk, J. Thomas, H. & Woroniuk, B., Handbook for the Integration of a Gender Perspective in the Education Sector, June 1997
Swedish International Development Cooperation Agency (Sida)**

Addressing gender issues in education is an important step towards broader social change. This handbook is a practical, user-friendly guide, focusing on the process of integrating gender issues into policies and programmes in the education sector. Written for Sida advisers, it is a useful tool for other advisers and consultants involved in developing and reviewing programmes and policies from a gender perspective both in the education sector and beyond. The first half outlines broad issues related to gender and education and the second half contains tables with

lists of questions to consider for mainstreaming gender in the programme cycle. These tables can be used by advisors as a quick reference guide. A one page summary proposes a rationale for taking a gender perspective in the education sector and a further summary contains key citations from international conventions.

The handbook can be ordered from Sida - email: info@sida.se.

Adapted from summary by Annabelle Newbigging, DFID.

3.3 Management

**Abagi, O, Mainstreaming Gender in Education: A Toolkit for Gender Responsive Education Management in Sub-Saharan Africa, June 1999
Collaborative Centre for Gender and Development, Kenya**

Gender gaps in education management can be attributed to a combination of: cultural norms and socialisation patterns; patriarchal structures and ideologies; gender insensitive teacher education programmes and rules governing promotions; and gender insensitive educational policies. The Gender Responsive Indicators toolkit (GEREDI) gives education planners, managers and researchers in Africa, a basic framework for assessing gender responsiveness in education management. Five components identify several steps and matrices to help the analysis and presentation of information. For example 'Drawing a balance sheet: contextualising the problem' outlines steps to help planners review national government's actions in the context of international and national agreements. The toolkit ends with several lessons that have been learned in Africa including the fact that the key to successful interventions is an active, gender-responsive government and there should be a concerted effort to motivate women to take managerial positions in education.

To order write to the Collaborative Centre for Gender and Development, P.O.Box 4869, Nairobi, Kenya, Tel: 254-2-537100/1, Fax: 254-2-537100, Email: ccgd@nbnet.co.ke.

Adapted from summary by Annabelle Newbigging, DFID

3.4 Gender Budgets

**Budlender, D, and Sharp, R, and Allen, K., How to do a Gender-Sensitive Budget Analysis, June 1998
Australian Agency for International Development (AusAID) and the Commonwealth Secretariat**

http://www.thecommonwealth.org/gender/publications/gms_pdf/AusAIDTr.pdf

A gender-sensitive budget is an analysis of the government budget to establish its differential impact on women and men and on different groups of men and women. This publication is a detailed guide on how to perform a gender-sensitive budget analysis. Aimed at informing governments that are considering undertaking a gender-sensitive budget exercise, it covers issues, methods and strategies for the first year of implementing such an exercise. These guidelines, which grew out of the experiences of developing gender-sensitive budgets in several

countries, demonstrate how this can be achieved. An effective budget analysis cannot be achieved unless the effects of government policies and resource allocation on the unpaid activities of the household and community. 'Gender aware policy appraisal' is the tool that has been used the most in gender budget analyses to date, however, the guidelines outline other possible tools and methods. Examples of countries engaged in gender-sensitive budgets illustrate applications of these tools and methods.

**Budlender, D. and Hewitt, G., Engendering Budgets: A Practitioner's Guide to Understanding and Implementing Gender-Responsive Budgets, November 2003
Commonwealth Secretariat**

http://www.thecommonwealth.org/shared_asp_files/uploadedfiles/%7BFBF59912-40C3-47A6-89C2-F3E5A0EA9B74%7D_Engendering%20Budgets%20final%20doc.pdf

This guide is part of ongoing work by the Commonwealth Secretariat to encourage and support Commonwealth governments to draw-up budgets that are more gender-sensitive. Since 1995, over 60 countries have undertaken some form of gender budgets work, with a central aim of improving the efficiency, economy and gender equity of development strategies in national economies. Although gender budgets must take account of local realities and be adapted to suit local needs, there are basic principles and tools that can be widely applied to ensure that budgeting is done in a gender-sensitive way. This guide provides background information including definitions, what these processes consist of and case study examples from where these initiatives have taken place, with a particular focus on the gender budgets processes of Australia and South Africa. Practical issues involved in implementing gender budgets are also addressed, including how to assess the existing situation, who to involve and suggestions on how to access resources.

**Senapaty, M., Gender Budget Initiative in India - Education Sector Insights, July 2002
DFID India Presentation**

http://www.siyanda.org/docs_gem/index_sectors/education/genbud.ppt

This presentation was given for DFID staff at a seminar entitled 'Gender Budgeting' in July 2002. It outlines gender budgeting efforts in India at the National and State levels including case studies from the education sector. A case study from the DPEP programme in India reveals the need for focusing on demand-side factors (which are not currently adequately addressed in budgets) to understand low enrolment, high drop out rates etc. Future strategies recommended include the need for increased capacity building in gender budget analysis and further examination of what gender budget analysis can help achieve in the context of direct budget support and fiduciary risk.

**United Nations Development Fund for Women (UNIFEM), Gender Budget Initiatives: Strategies, Concepts and Experiences, April 2002
UNIFEM Conference Papers**

http://www.gender-budgets.org/uploads/user-S/10999498771UNIFEM_GBI_2002.pdf

This publication aimed at ministers, experts and civil society actors contains papers from a high level international conference 'Strengthening Economic and Financial Governance through Gender Responsive Budgeting' held in Brussels in October 2001. In the light of the significant growth and progress of gender budgets throughout the world, the conference examined key

objectives of efficiency, equality and accountability, addressing a wide range of themes. UNICEF's publication of the conference papers is divided into three sections:

- concepts, tools and approaches;
- country-level experiences;
- advocacy and mobilisation.

The papers combine an analysis of theoretical models with practical tools, lessons learned and future challenges. They look at both country-case studies such as South Africa, Tanzania, the Philippines and India, and at the work of UNIFEM, the Commonwealth Secretariat and the International Development Research Centre (IDRC) in promoting gender budget initiatives. The book also includes the conference communiqué, which proposes a global vision for gender budget initiatives, reiterating commitments of states and setting out four main principles of transparency, efficiency, participation and equality. In particular it encourages governments to draw up gender equality budget reports on an annual basis, and promotes the support of development agencies in this area.

Adapted from summary by Annabelle Newbigging, DFID

4. Gender Training

Ahsornkool, N. Gender Training Module, 2002

UNESCO Guidance, Counselling and Youth Development for Africa Training Manual

http://portal.unesco.org/education/en/ev.php-URL_ID=34630&URL_DO=DO_TOPIC&URL_SECTION=201.html

This publication is intended to sensitise educational managers, curriculum and material developers, and media professionals to gender concerns. 'Training of trainers' is a way to ensure that education is able to play a more active role in the growth and the development of young people. The training modules deal with a range of themes and skills including guidance, counselling, reproductive health, social work and gender awareness. All the modules in the series show how to address sensitive issues in a non-threatening way – and use charts, transparencies and video films to make the material more accessible. The gender module looks at concepts of sex, gender, gender roles and equality. It discusses how to raise awareness around important gender issues and describes the advancements made in work to promote gender equality over the past decades. It also addresses the need for cultures to adjust to shifting gender relationships and power balances through demonstrating how gender equality can contribute to the social and economic growth of a country.

Newbigging, A., A mapping of Gender Training and Awareness raising Activity for Education Professionals across 14 Donor Agencies in the UNGEI network, 2002

This report identifies gender training awareness-raising activities for education advisers in headquarters of international agencies. The second half of the report contains individual agency 'maps', which include information on activities, institutional capacity, key personnel and relevant texts. References to training material and guidelines can be found in the general bibliography, and details of gender and education consultants are available from DFID.

The report is available from DFID in hard copy.

Mingat, A., IREDU, France and Tan J.P, Policy issues in Girls' Schooling: A Three-Part Training Module, 1997
World Bank

<http://www.worldbank.org/education/economicssed/tools/hands/girlsjpt.doc>

This online training module has been designed by the World Bank and Institute de Recherche sur l'Economie de l'Education (IREDU), France to build skills in analysing girls' education issues and implementing appropriate, locally appropriate solutions. It is targeted at policy makers in the education sector and statisticians in national education ministries. The authors argue that there are commonly two extreme approaches regarding girls' schooling; the 'do-nothing' position, which fails to acknowledge that even when country circumstances are dismal there often remains some scope for public intervention; and the 'do-everything-possible' position, which is indiscriminating and ignores issues of costs and benefits in the choice of interventions. This training module offers some methods for reaching a more rational perspective on girls schooling. It focuses on three specific analytical issues:

1. diagnosis of the problem, including its locus in the education system;
2. assessment of potential options to address it;
3. translation of the analysis into a well-justified and locally-appropriate implementation strategy.

The intention is to demonstrate how relatively simple approaches can yield persuasive inputs for policy design. The data needs are not uniformly demanding - some of the data are easily available from the administrative records kept by national data collection agencies. Other data may require specific surveys which need to be incorporated into a systematic program of analytical work. The training module requires knowledge of statistics and Excel.

Summary adapted from the Introduction

Nath, M. B. Gender, HIV and Human Rights: A Training Manual, 2000
UNIFEM

http://www.unifem.org/resources/item_detail.php?ProductID=5

This training manual is for resource for community-based AIDS workers, public health staff, educators, other practitioners and policy makers. Community-based AIDS projects that enhance the decision-making power of women are very successful in preventing transmission and supporting women in caring for people who are affected by HIV/AIDS. The first module provides comprehensive background information on the epidemic and the challenges faced. The second module introduces the links between gender and HIV/AIDS for planners and practitioners. The third module outlines the human rights approach and is aimed at those influencing policy such as lobbying NGOs and the media. Step-by-step training is given and questionnaires are included dealing with common misconceptions about the illness. The manual also provides statistics to stimulate discussion and case studies from various countries which illustrate the dangers of limited knowledge. It concludes by describing some of the lessons learned from previous training sessions.

5. Project-Level Tools for Education Practitioners

**Academy for Educational Development, Educating Girls: A Map to Context Analysis, November 2000
Sage Project, USAID**

This is a planning tool designed to assist practitioners in performing a context analysis to identify the status and conditions of girls' educational participation, the multiple factors affecting them and their solutions. This tool is useful at any point in the life cycle of a girls' education activity. It is a publication from AED, an American non-profit organisation working to improve opportunities for the least advantaged in the US and around the world, with funding from USAID. It is aimed at practitioners and planners responsible for ensuring gender-sensitivity in the delivery of educational programmes. It highlights the importance of recognising that identifying problems and developing solutions to the challenges of girls' education does not simply happen in one 'office, sector or segment of society'. Rather, context analysis allows planners to identify 'the status and condition of girls' educational participation, the multiple factors affecting them and their solutions'. These varying concerns are then 'mapped' to provide a holistic view of how to address barriers to girls' education in a particular context. It recommends a range of techniques to diagnose problems in a given context, including:

- Statistical analyses that give an indication of educational status in a particular area;
- Classroom observation to gain a direct understanding of existing teaching-learning processes;
- Examination of the policy framework in which educational decisions that may be preventing girls' access to education;
- Homogenous focus groups of stakeholders involved, such as groups of mothers, teachers or students, to reveal any barriers to girls' participation in education.

Electronic copy available.

Finland Ministry of Foreign Affairs, Training package for the Promotion of Gender Equality in NGO Development Cooperation, 2004.

<http://global.finland.fi/gender/ngo/english/>

This training package has been created by the Department for Development Policy's Unit for Non-governmental Organisations in Finnish Ministry for Foreign Affairs. It is part of the implementation of the Ministry's Strategy and Action Plan for Promoting Gender Equality 2003-2007. It provides NGOs engaged in development cooperation with basic information about gender perspectives and practical advice about how gender equality can be promoted through NGO projects. With the help of concepts, examples and exercises dealing with gender equality and project cooperation, NGOs are offered basic training that will improve the abilities of their own projects to reduce gender inequalities. The training pack is divided into six main sections, each of which starts by setting out the goal and provides links to training exercises or examples. The first three sections specify the basic principles, concepts and methods connected with gender equality in development cooperation. The following section then examines the successive stages of development cooperation project cycles particularly from the point of view of gender equality. The final sections provide information about gender equality in organisations

and make suggestions as to the minimum that should be done in planning in order to pay due attention to gender equality.

Summary adapted from website.

Hoa P. T., Gender Scan, 2003
Plan International, Asia Regional Office

This 3-page planning tool outlines in table format, one way in which a project or programme might respond systematically to the question 'How gender sensitive is your country education programme?'. It is aimed at project planners and facilitators assessing the extent to which gender concerns are reflected in the planning and execution of education programmes. It was used by Plan International country staff to identify both the positive and the not-so positive features of country education programs, through a gender lens. Based on the scan results, action plans were made to fill the gaps. It progresses sequentially from looking at the family, through to the community, school and national levels of education planning, presenting a series of detailed statements. Statements such as 'It provides a safe physical environment where girls can study without fear' are ranked by the planner from 'very low' to 'very high', where 'very high' would indicate a high degree of gender-sensitivity in the education program.

Electronic copy available.

Rimer, W., Toolkit – Assessing and Promoting Equity in the Classroom
Equity in the Classroom Project (EIC), undated

http://www.caii.com/CAIStaff/Dashboard_GIROAdminCAIStaff/Dashboard_CAIAdminDatabases/publications/EIC_Toolkit.pdf

This toolkit from the Equity in the Classroom Project is aimed at teachers, teacher trainers, school directors and others at the school level. The toolkit is designed to help conduct school-based research and teacher learning to identify factors that limit equitable participation and achievement in education and to provide strategies to improve curriculum and teaching. The tools include:

1. School Equity Profile: to establish what factors affect gender inequality.
2. Child Profile: to establish problems that affect the learning process.
3. Classroom Observation: to identify specific factors in the classroom (teaching methods, teacher-student dynamics) that lead to low levels of girls' participation.
4. Textbook Analysis of Equity: for collecting quantitative and qualitative data which shows gender biases.
5. School and Family Interaction: to collect information on the relationship between school and family and to raise awareness on issues of gender equality.
6. Action Plans: to define objectives increase the commitment for action.

**Peace Corps, *In the Classroom: Empowering Girls – Idea Book*, 2001
The Idea Book Series**

http://www.peacecorps.gov/library/pdf/M0082_inclassempowergirls.pdf

This book looks at strategies to increase girls' access to and participation in good quality school education. Designed for use by Peace Corps volunteers it also supports others acting as role models, technical specialists, health workers, teachers or counsellors. The book starts by outlining why it is important to look at girls' education and identifies some of the key issues. It defines education in a broad, holistic sense, and places the emphasis on ensuring that the learning environment is 'girl friendly'. Information is provided on classroom and curriculum activities such as designing a lesson plan, co-curricular activities, awards and incentives, setting up scholarship plans and mobilising families and communities. The book also includes lots of case studies and examples of good practice such as a model maths lesson and regional girls' education festivals in Niger.

**Wendt, S., Lateef, S., and Schoeffel, P., *Gender Checklist: Education*, June 2002
Asian Development Bank (ADB)**

www.adb.org/Documents/Manuals/Gender_Checklists/Education/

This checklist is designed to help development practitioners at the project level to establish whether the project objectives deal directly with the needs of women, particularly among the poor, and if women have a hand in setting the objectives. The first sections focus on: (i) basic and primary education, (ii) secondary education, (iii) tertiary education and (iv) non- formal education and training. Case studies from ADB's portfolio are used to illustrate issues and strategies in each case. In Pakistan, for example, separate committees for men and women have been established with the help of NGOs to ensure full community participation in the management of community model schools. The latter sections outline strategies for gender mainstreaming, and guidelines for preparing gender-sensitive TORs such as improving the quality of teachers and increasing the number of female teachers.

Adapted from summary by Annabelle Newbigging, DFID.

**Mukabi Kabira, W. and Masinjila, M., *ABC of Gender Analysis*, June 1997
Forum for African Women Educationalists (FAWE), Kenya**

<http://www.fawe.org/publications/Manuals/abcgenderanalysis.pdf>

This handbook was commissioned FAWE to raise awareness of policy- makers, curriculum developers, textbook writers, and teachers to the dangers of a gender-blind curriculum. It provides a simple gender guide for reviewing and analysing textbooks and other educational resources. It also goes beyond the official curriculum to consider gender dimensions of the 'hidden curriculum', extra-curricula activities and resources, and space utilisation. The framework uses both quantitative and qualitative methods to explain the gender map of curricula, and the possible implications for the learner. Research has shown that school textbooks are often biased in their portrayal and perpetuation of gender roles and relationships. Apart from learning the technical aspects of the subject content, children will pick up implicit gendered messages from the text about what people do, how they relate to one another, and how the world is constructed. In this way, textbooks serve as socialising agents. It follows that in any written, visualised, or spoken text a gendered vision of the world is presented. For example, if in a text girls are consistently shown as helping parents in the home with little visibility of boys in the same roles, it

is probable that learners would take this as representing the desirable norm. The effect can be to constrain both girls' and boys' considered options.

6. Sex–disaggregated statistics and indicators

- Eldis Gender Statistics
<http://www.eldis.org/statistics/index.htm>
A list of various sources of gender statistics, including data from the USAID's Demographic and Health Surveys, the UN and regional publications on women.
- CIDA Guide to Gender sensitive indicators
www.acdi-cida.gc.ca/equality
Review of techniques for choosing appropriate indicators and discusses specific methodological approaches to measuring and using them at project level. The guide is designed for CIDA staff, but has wider relevance to monitoring and evaluation in general. Includes section on Education sector and case study in primary education.
- UNECE Gender statistics website for Europe and North America
<http://www.unece.org/stats/gender/web/welcome1.htm>
A discussion of some issues relevant to gender statistics.
- UNESCO Division of Statistics, Gender-sensitive education statistics and indicators: a practical guide
<http://www.uis.unesco.org/en/pub/pub0.htm>
Training material for workshops on education statistics and indicators. A guide to collecting, presenting, monitoring and analysing sex-disaggregated education data. Targeted primarily at producers of education statistics in education ministries and national statistical offices. This also provides practical advice for policy makers and managers of education programmes.
- UNESCO, Gender and Education for All: The Leap to Equality – Global Monitoring Report
http://portal.unesco.org/education/en/ev.php-URL_ID=23023&URL_DO=DO_TOPIC&URL_SECTION=201.html
(See summary in section 1 of this bibliography)
- World Bank Gender Stats website
<http://genderstats.worldbank.org/>
A list of gender statistics by country using internationally comparable data from the World Development Indicators report - original data source UIS. The statistics can be quoted publicly and are consistent with PSA data.
- World Development Indicators Report
<http://devdata.worldbank.org/data-query/>
The definitive source on development indicators used by DFID for global reporting.