



#Women2030 Master Manual for Training of Trainers: Building knowledge, skills, and capacity to implement gender-responsive SDGs



Module 4: Mainstreaming gender into organizational policies



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Contents

Introduction:	2
Target group:	2
Structure:	2
Session 4.1: Gender-sensitive Organisational Development for NGOs and CSOs	3
Learning objectives	3
Guidelines for the Trainer/Facilitator	3
Key Activities for mainstreaming gender into organizational development	4
Gender audit:	4
Gender sensitive strategies, policies and structures	4
Human Resource Management and staffing	5
Building internal capacity for a gendered approach.....	6
Information and communication	7
SESSION 4.2: Gender in Development Planning.....	8
1. Gender mainstreaming in Project management	8
Some essential steps to mainstream gender into development projects	10
2. Gender Budgeting	11
Why is Gender Budgeting (GB) important?	11
Clarifying what Gender Budgeting is and isn't:.....	12
Sustainability of gender budgeting	12
3. SDGs and Financing for Gender Equality	13
Interactive Exercises	13
Problem gallery and problem ranking (1 to 1.5 hours).....	13
Venn Diagram Exercise for Stakeholder Analysis (1 hour).....	14
Resources and Tools on Organisational Skills	15

Introduction:

The objective of this module is to equip the trainer with key information and tools to guide participants on how to mainstream gender into their organisational policies and procedures so as to make their work more responsive to the needs and concerns of the poor and marginalised groups in their local area. The module will primarily concentrate on integration of gender into strategy planning, budgeting, staffing, networking and communication, and monitoring and evaluation in an organisation. It will also have a shorter section on gender-responsive governance, covering gender mainstreaming in the project cycle and gender budgeting. Information is presented in a concise style, and will refer to resources and tools of the Women2030 partners as well as external agencies, for more detailed reading.

Target group:

This module is written for practitioners who are involved in the management and administration of small to medium-level local development organisations such as Civil Society Organisations (CSOs) and Community Based Organisations (CBOs), and grassroots women and men groups. It is assumed that they already familiar with basic organisational management and administrative procedures, and are interested to learn how to mainstream gender in them so as to carry out their work more effectively, equitably, and sustainably. It is meant that the trainees will pass on the learning, as mentors or local Trainer of Trainers (ToTs), to colleagues in their organisation, as well as to other local organisations in their local and/or regional network.

Structure:

The module is divided into 2 sessions, each with a set of interactive group exercises, and web-links to further resources, for more detailed information. As far as possible the sessions will be elaborated in a bullet-point style/overview, which will be useful to use in a Power Point if needed. The text will include **'tips'** for the trainer on the use of certain tools and exercises in a particular context.

TIP: We recommend making good use of the interactive exercises in this module to increase the opportunity of 'learning by doing' for the trainer as well as participants and/or trainees.

It would be good to start with an interactive exercise on what the participants expect to learn from this training module (let each participant note down one concrete expectation/learning they want to take away from this training module on a card. Put the cards up on a wall, so they can be revisited during the evaluation session of this training).

Session 4.1: Gender-sensitive Organisational Development for NGOs and CSOs

Learning objectives

At the end of this session participants will:

- *Know some key considerations of gender-sensitive annual planning of activities and budgeting in an organisation*
- *Know some key points of integrating gender in workplace policies and practices*
- *Know important criteria for gender responsive monitoring and evaluation in organisations*
- *Know about gender-sensitive organisational communication and networking*
- *Know how to use interactive exercises to encourage gender-responsive organisational practices*
- *Be familiar with websites and resources to access more detailed information on the above subjects*

Recommended session length: 4 hours, including an hour for exercises.

Guidelines for the Trainer/Facilitator

It is recommended to concentrate on Session 1 which is the core topic of this module. However if there is more time available and interest from the participants, Session 2 can be covered briefly (remember to share the links to resources for further information, which participants can access in their own time for self-learning)

You can decide how long you want to spend on certain topics, but:

- ✓ *DO try and address all of them, so as not to miss any relevant information out.*
- ✓ *DO keep enough time for the interactive group work as that is a crucial learning aspect of this module.*
- ✓ *DO adapt the exercises to make them more relevant for your participants and to the local cultural context.*
- ✓ *Please DO make good use of the section on resources and web-links to add more interesting details to your session.*
- ✓ *DO ensure that all participants have a say and are involved in the training at some level. However do not force it – it should be based on personal will.*
- ✓ *DO make good photos of participants interacting during the workshop.*
- ✓ *DO assign re-cappers, timekeepers and note-takers from the participants to assist facilitation and documentation of the session and to utilise the available skills and knowledge.*

GOOD LUCK!

TIP: If participants are new to each other, you can conduct the introductory icebreaker exercise - 'Find a Friend' (20 minutes) from Module 3 of this training manual, in the section on **Interactive Exercises**. Or choose another ice-breaker exercise from the WECF and GWA ToT documents mentioned in Module 3 (Resources and Tools)

How gender friendly is your own organisation, or that of your partners? We all tell people how important gender equality is but do we practice what we preach? Do your personnel have equal chances? Do your projects integrate gender considerations or only when it is asked for by the donor? It may be that though you are willing to take steps to make your organisation and its policies and practices gender-sensitive, you don't know how to. This session can help to close this gap as it outlines some key activities that an organisation can undertake to be more gender-sensitive in its planning, staffing, budgeting, project activities, and communications.

A gender and diversity-friendly organisation will not just lead to more equitable and sustainable projects and programmes; but also help to create a diverse, dedicated and loyal workforce; and make you a true role model and mentor for other stakeholders.

Key Activities for mainstreaming gender into organizational development

Gender audit:

Also known as organisational gender assessment or gender capacity assessment tool. Through a gender audit you can assess the internal organisational practices and procedures, to evaluate how inclusive and gender-sensitive they are, and assess their impact on the effectiveness of the day-to-day work of the organisation. An assessment reveals if the system is creating space for solving gender issues in the workplace, which ultimately impact on the gender objectives in its work mandate.

TIP: WECF has an *Organisational Self-assessment Tool (2013)* that is useful for a NGO or CSO to develop and improve its work. See:

www.wecf.eu/download/2015/November/FinalPartnerassessmenttoolSep.2013-final.pdf

GWA has a *Policy Development Manual (2003)* that includes a step-by-step guideline for organisations interested in developing a gender policy and doing a gender scan or audit, see: <http://genderandwater.org/en/gwa-products/policy-influencing/policy-development-manual/view>

In the paragraphs below we will shortly discuss the most important questions to ask and aspects to consider as part of an internal participatory gender assessment with staff. For this to give useful results the assessment should be conducted in a participatory fashion where all levels of staff are involved, and everyone has the space to give their opinions and ideas openly. The questions and points are ranged under key themes of gender-sensitive management.

Gender sensitive strategies, policies and structures

Having a few gender or women projects does not automatically make you a gender organisation. A commitment for gender equality should be shared at all levels. An important step is to make this commitment explicit in policies and documents, with provision for enforcement (budget, staff time, expertise). To start with ask the following:

- Is gender part of the strategic and annual plans? Is it included in the organisational, vision, mission and objectives? Are the inequalities in power acknowledged?
- Are policies developed in an inclusive and gender-sensitive manner?
- Is there a gender policy in place, and is it effective?
- Are staff aware of the gender aspects of their work, and are they able to do it (time, training)?
- Are there gender experts in the organisation and are they able to work in an integrated way with other colleagues and departments as required?
- Is there budget allocation for the extra time and specific activities that will be needed for a gender-sensitive planning and structure

Short group exercise: Analysing a strategic annual plan

Divide into small groups. Together analyze the strategic plan (especially vision, mission, objectives) of one of the organizations present.

Is gender mainstreamed at all levels? What are the advantages of this? What are the disadvantages? What is missing/ can be done differently?

Human Resource Management and staffing

Good gender sensitive personnel management practices are essential to create an organisation with equal opportunities, where staff feels at home, are committed and dare to speak out. Key aspects include:

- Are there equal employment opportunities? Through using affirmative action recruitment and promotion procedures you can give priority to groups which are usually discriminated like women, ethnic minorities, and persons with disability
- Appoint women into technical and managerial roles, not only to positions which fit in the traditional role patterns like secretarial or support positions
- Promote equal salary and equal access to opportunities in career development to female and male staff.
- Develop measurable, gender-disaggregated targets to monitor progress in staffing¹
- Offer possibilities for on-the-job training for local women and men to be promoted to functions of increasing responsibility.
- Include gender competences and gender attitudes (of all staff) in the performance appraisal process
- When recruiting local volunteers in community-based projects, make sure that women do not wind up with even heavier workloads that offset the benefits of added income and improved services.

¹ where feasible, in very small organisations this might not work

- Have family friendly work practices like flexible working arrangements, maternity and paternity leave, and allowances for child care equally allowed women and men to stay working through their life cycle?
- Are sexual harassment policies and procedures in place, and applied?

Building internal capacity for a gendered approach

In a gender sensitive organisation all staff, including support staff, should be aware about the vision and mission of the organisation and the importance of gender equality. Make sure all staff stand behind the choices of the organisation and act according to it. You cannot convince people of the need of gender equality when the driver of the staff vehicle makes gender insensitive jokes or bosses around young women. Important aspects to discuss here are:

- Does the organisation have systems and processes for sharing lessons and good practices? Are good practices on addressing gender issues recognized and awarded?
- Are training opportunities provided for women such as assertiveness and leadership training?
- Is staff skilled on gender and gender analysis? Technical and managerial personnel also need thorough training in gender and participatory planning, implementation, monitoring, and data collection methods.
- Ensure that training schedules and field visits are convenient for women (participants and staff) to combine with their other work.

Short group exercise: Positive versus Negative Promotion

This exercise can be done with staff from different levels, including support staff, working in small groups. It aims to make staff more aware about 'negative' promotion and let them think about how they can 'positively promote' gender instead. Write the following 2 statements on a board:

'I know gender is not a problem in our country. We just work on it because the donor wants it'

'I tell people that I work for an environmental organization, if I tell them about the women's rights part they don't take me seriously anymore/ make jokes'

Each staff writes down two or three examples where (s)he or someone else denied the importance of gender equality

All present their examples. Discuss in the group what you should do/ say instead

Information and communication

CSOs working in development can potentially contribute to the promotion of gender equality through the way they communicate with women and men of different ages, races, sexual orientation and religions, and from different places. But they can also validate gender stereotypes that worsen prejudices and discrimination against specific groups of women and men. It is therefore very important to be conscious of this when you communicate, inform, educate, and mobilize people as part of your work². Some important points to consider are:

- Target information, communication, and capacity development with an understanding of gender roles. For example do not conduct a general gender workshop for all levels of staff when differences in levels of education, status, and religious customs may limit some women and men from participating freely and fully.
- Aim to involve women and men from under-represented groups (rural, poor, ethnic minorities, disabled, LGBT) in reporting and documenting their own lives and causes, through photographs, videos, testimonies and press releases about their own communities. This will reveal new perspectives that help to breakdown old ideas.
- Prevent the use of stereo-types in your written and spoken communication For e.g. avoid using photos that show women doing household work, and men operating machines. Instead show photos of women in action, especially in sectors where they tend to be invisible (as farmers, politicians, or engineers for instance). Do not to talk about “local people” but about “poor local female farmers” or “poor male farm labourers”.
- Aim to increase women’s and girls’ access to media education and equipment (such as cameras, smart phones and the internet) to reduce the gender digital divide.
- Educate staff to respect tradition, culture and native languages, and use them as a means to bridge gaps between different women and men they work with, as this can resonate with grassroots communities, as well as help to mute opposition from conservative segments of society.

² See also the introduction ‘Gender and media’ written by GWA in the Women2030 Media Training Toolkit (link is under ‘Resources and Tools’ section of this module)

SESSION 4.2: Gender in Development Planning

Learning objectives

At the end of this session participants will:

- *Know about gender mainstreaming in the project cycle*
- *Know about gender budgeting*
- *Be familiar with websites and resources to access more detailed information on the above subjects*

Recommended session length: 2 hours

This session is about how to make sure that gender concerns and priorities are represented in two concrete activities in development planning:

1. The management of a development project. This can be influenced directly by the CSO in the way they manage a project they are responsible for;
2. In the planning of budgets of development policies, programmes, projects and related actions. This can be influenced directly by the CSO for the way they allocate their own budget; and indirectly in the way they advocate for changes in funds allocated by donors and governments.

1. Gender mainstreaming in Project management³

A project combines a specific range of resources and activities which are brought together to generate clearly defined outputs within a given budget and a specified period of time. Compared to a program, a project is more specific and has more clearly defined targets and timeframes. A project can be best understood as a “solution to a problem”. Examples of a project could be ‘Improving hygienic behaviour of households in a particular rural/urban area in WASH’, and ‘Community-based reforestation’.

Development projects are more than just resources and activities, the most crucial element in any project are the people. They are the driving factors towards attainment of economic efficiency, environmental sustainability and social equity. But people are not a homogenous group. Women and men have different needs, perceptions and realities according to their gender, age, ethnicity, social and economic standing etc. It is important to be informed about and recognize these differences and systematically identify the consequences a (proposed) project has on the different groups of women and men. This information should be used to adjust the project in such a way that the intended target group is reached and benefitted by the project and possible negative outcomes for them, other stakeholders, and the local environment is avoided.

³ Adapted from the 2002 GWA ToT Manual ‘Gender mainstreaming in Integrated Water Resources Management’ (Module 3)

Through mainstreaming gender into your project you:

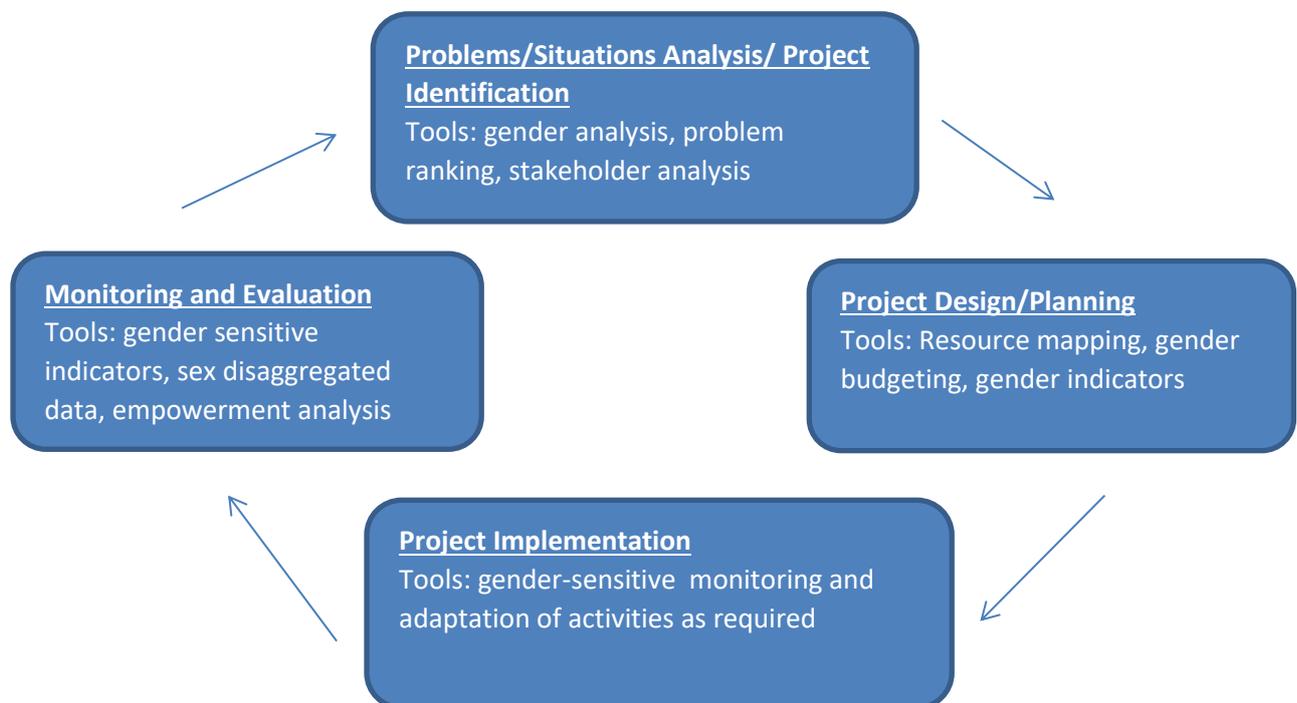
- Secure interest and ownership of local women and men in interventions by understanding their specific needs and interests, and scope for participation
- Maximize use of local knowledge and resources.
- Build confidence of women and men to generate and sustain improvements in their situation.
- Ensure sustainability of project-generated improvements even after phase-out

To facilitate mainstreaming of gender in a project, it is necessary to:

- Be aware that there are different stages in project management (also called project cycle) and what they are.
- Be aware that there are certain tools by which you can identify and anticipate potential gender issues/concerns in the different stages of the project cycle
- Develop gender indicators that generate sex- and gender-disaggregated data to monitor project development in a gender-sensitive way

The figure below⁴ gives a brief overview of the different stages in project management, and the tools for mainstreaming gender in each of these stages

PROJECT MANAGEMENT CYCLE



TIP: The *GWA ToT Manual (2002, Module 3 and 4)* has useful information on Gender Analysis, Gender-sensitive indicators and data collection in a project, Tools for gender mainstreaming, and Checklists/guides and Strategies for mainstreaming gender in the different stages of the project cycle.

The 2014 EWA-WECF report "*Gender in Sustainable Development: Collection of Exercises for Training of Trainers (ToT)*" also has exercises that explain tools such as stakeholder analysis, resource mapping through group-work.

See **Resources and Tools** section of this Module to access these documents.

Some essential steps to mainstream gender into development projects

These include:

- **Conducting gender analysis:** using qualitative and quantitative methods to collect gender and sex disaggregated information on the diversity in the target population and area, which can affect the goals and outcomes of the project. This includes information on:
 - Activities (who does what?);
 - Resources (who has what) of women and men,
 - What influences arrangements related to resource access and control? (laws, policies, religious customs, social norms); and
 - How are public resources distributed and who gets them?

Applying an empowerment approach: enable marginalised groups and women to empower themselves, economically, culturally, politically and physically. These are four interactive aspects of empowerment. Recognise the work of women and men equally in planning, implementing and reporting. Especially in cases where doing a Gender Analysis as mentioned above is very complicated, this could be a simple way of ensuring that marginalised groups, including women participate in project management.

Note: The **GWA** uses an Empowerment Approach as a field methodology and framework for analysis. The framework is presented in Module 1 of this training manual (Gender, concepts and mainstreaming gender in the SDGs). See also: <http://genderandwater.org/en/gwa-products/capacity-building/empowerment-for-gender-equality>

- **Using participatory planning processes:** ensuring a gender-balanced expression of ideas, targeting women's and men's opinions about the need of the planned intervention for them, the technological options, management and administration of project activities, and seeking equitable participation giving consideration not only to gender, but also to other variables such as age, wealth and education.
- **Ensuring information reaches and is understood by both men and women:** considering the cultural context and seeking communication channels that reach both men and women, and ensuring that information is presented in such a way that it enables both women and men to participate in decision-making and make informed decisions

and

choices.

- ***Ensuring that women and men (including the poor and marginalised groups) gain from project resources and benefits through:***
 - Involving women as well as men in the various stages of development projects including infrastructure planning and development, operation and maintenance of technology (water pumps, solar heaters etc.), managing local revenue systems (water tariffs), and behaviour change (hygiene management, gender-based violence)
 - Ensuring that development interventions promote access to productive resources (land, water, credit, seeds, extension services, etc.) for both women and men, and especially the poor groups.
 - Increasing awareness of, and encouraging women and marginalised groups as ***change agents*** (with knowledge and capacities), rather than just as passive beneficiaries of development interventions.

2. Gender Budgeting⁵

Gender budgeting (GB) provides a way of assessing the impact of (local) government revenue and expenditure on women and men, girls and boys. These initiatives are also referred to as ‘women’s budgets’, ‘gender-sensitive budgets’, and ‘gender-responsive budgets’.

Why is Gender Budgeting (GB) important?

- GB can help to improve economic governance and financial management. Looking at budgets through a gender lens shows clearly where the collection and distribution of public money is unequal and inefficient. It also shows how discrimination affects national development.
- GB can provide feedback to government on whether it is meeting the needs of different groups of women and men, girls and boys.
- For those outside government, such as advocacy organisations and civil society organisations GB can be used to encourage transparency, accountability and participation.
- They should also provide data that can be used in advocacy.
- For those both inside and outside government, gender budget work provides information that allows for better decision-making on how policies and priorities should be revised – and the accompanying resources needed – to achieve the goal of gender equality.
- Gender-responsive citizen budget initiatives complement anticorruption strategies.
- It can be used to report on government’s progress on compliance with national and international gender-related commitments, recommendations and action plans (e.g.

⁵ Adapted from Budlender, D., Hewitt, G., 2006. ‘Engendering Budgets: A Practitioners’ Guide to Understanding and Implementing Gender-Responsive Budgets’

national gender policies, the SDGs and CEDAW).

Clarifying what Gender Budgeting is and isn't:

- GBs are not about dividing government money 50–50 between men and women. This may look equal, but it is often not equitable, or fair. Instead, GB looks at the full government budget from a gender perspective to assess how it will address the different needs of women and men, girls and boys, and different groups of women and men, girls and boys. For example, in the area of health, male and female people will have similar needs in respect to influenza and malaria. But women will have greater needs than men in terms of reproductive health.
- Similarly GB does not aim to create separate budgets to address women's or gender concerns. Special allocations for women and gender are sometimes helpful in addressing specific needs, but they are of limited use if the rest of the budget continues to privilege some citizens above others.
- GB is about ensuring that when resources are scarce, the available resources are used to assist those who are least able to provide for themselves. It encourages reprioritising within and across sectors rather than only an increase in overall government expenditure.
- Having a separate budget-line in project budgets for gender-responsive activities like hiring of a gender expert to develop a gender strategy is not gender budgeting, but rather an allocation of the budget to one specific gender activity. If the proportion of the budget allocated to other gender responsive activities is very marginal, this cannot be considered as a gender budgeting initiative

Sustainability of gender budgeting

There have been GB initiatives in several countries over the years, however, when initiatives have been one-off exercises – sometimes only a workshop for government staff, with no follow-up - they are ineffective. It is also not helpful that much of the GB work is dependent on external assistance. Gender Budgeting has the greatest potential impact if it is ongoing rather than one-off, and if it is driven by local groups rather than donors.

RESOURCE TIP: How to implement gender budgeting?

Lots of useful information on this subject, as well as on some common frameworks used for Gender Budgeting by CSOs, can be found in the 2006 publication 'Engendering Budgets: A Practitioners' Guide to Understanding and Implementing Gender-Responsive Budgets' by Debbie Budlender and Guy Hewitt.

See *Resources and Tools* section to access this publication

3. SDGs and Financing for Gender Equality

A recent study found that financing gaps for the implementation of national action plans on gender equality are as high as 90% (UN Women 2015). Mobilising sufficient financing for the full implementation of national gender equality commitments is hampered by a number of factors including:

- (1) Lack of evidence on gaps and corresponding political commitment to allocate resources to gender;
- (2) Lack of alignment between fiscal policies and gender equality objectives coupled with weak capacity to integrate gender into national planning and budgeting processes;
- (3) Insufficient prioritization of gender equality in other financing streams such as Official Development Assistance (ODA), private and innovative financing; and
- (4) Lack of accountability and monitoring mechanisms to hold public and private actors to account.

TIP: Transformative Financing for Gender Equality and Women's

Empowerment is one of UN Women's Flagship Programming Initiatives designed to ensure that UN Women supports Member States to mobilize the requisite financing for implementing SDG 5 and the gender related targets across the other Sustainable Development Goals (SDGs). UN Women has identified four priority outcomes to mobilize maximum resources for gender equality from all sources and at all levels. To read more about these priorities, and other details of the programme please download the UN Women brief on:

<http://www2.unwomen.org/~media/headquarters/attachments/sections/library/publications/2016/fpi%20brief-gender-financing.pdf?v=1&d=20160125T163802>

Interactive Exercises

The exercises for Session 1 have been included within the text of the session. The exercises below have been taken from the 2014 EWA-WECF report *Gender in Sustainable Development: Collection of Exercises for Training of Trainers (ToT)*. This report also has many more exercises which may be useful for participatory identification and planning of a project.

Problem gallery and problem ranking (1 to 1.5 hours)

Purpose: This exercise is split into two steps.

Firstly the problem gallery exercise will allow facilitators to identify women's and men's problems in the community. The expectation is that women and men will report different problems, due to them having different preoccupations, which might stem from the gendered division of labour and/or from existing gender relations.

Secondly, the 'Problem ranking' will provide practitioners with information about women's and men's differentiated priorities within the community, with the objective of highlighting existing gender needs.

Method:

Female and male participants should be assembled in separate groups.

Each group is asked to make a list of all the problems they currently experience.

From this list, participants should choose the five problems that they feel are the most important. Then facilitators should encourage a discussion among participants, to see if the members of one group (e.g. the men) can relate to the problems listed by another group (e.g. the women).

Each participant is then asked to vote for the problems he/she feels are the most important, among the problems identified.

Facilitators should then count the results and encourage a brief discussion among participants, to see if everyone agrees with the defined priorities.

Venn Diagram Exercise for Stakeholder Analysis (1 hour)

Purpose: This exercise will allow facilitators to identify the different groups, organisations, institutions, and important persons active within the community, to assess how they relate to each other (in terms of service provision, information flows, cooperation, etc.).

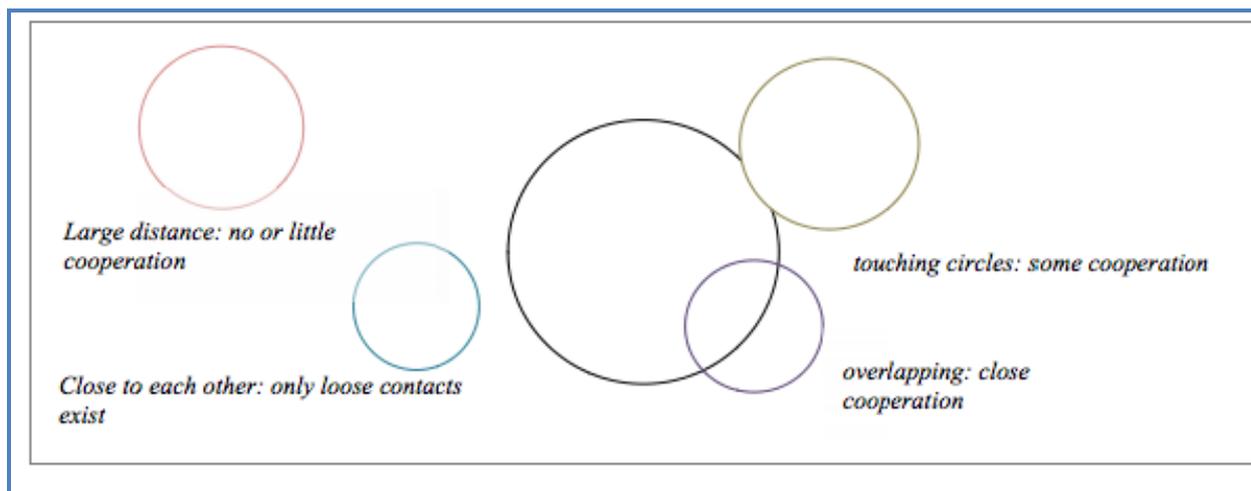
The stakeholder analysis will highlight differences in public participation, prestige and decision-making, based on gender and social status.

Method:

Female and male participants should be separated, if possible. Participants are asked to draw a Venn diagram (see picture below):

- A large circle in the middle represents the community (or the individual), while stakeholders are represented by other circles from different sizes.
- The more important the stakeholder, the bigger the circle should be.
- The degree of contact and/or cooperation between the community (or the individual) and the various stakeholders is represented by the distance between circles: for example if the individual is in constant contact with an institution or a group, the circle that represents it should be placed inside its own circle. Circles overlapping indicate a close cooperation, circles that are close to each but not touching other indicate loose contacts, etc.
- If certain institutions or groups exclude one gender (e.g. men's clubs), they should be marked with a special symbol.
- Same thing for institutions or groups that exclude poor people

Example of how a Venn diagram of a stakeholder analysis looks like:



Resources and Tools on Organisational Skills

1. **Organisational Self-assessment Tool**, WECF, 2013. This is a useful tool for a NGO or CSO to develop and improve its work.
www.wecf.eu/download/2015/November/FinalPartnerassessmenttoolSep.2013-final.pdf
2. **Policy Development Manual**, GWA, 2003
A step-by-step guideline for organisations interested in developing a gender policy and doing a gender scan or audit
<http://genderandwater.org/en/gwa-products/policy-influencing/policy-development-manual/view>
3. **Women2030 Media Training Toolkit**, GFC, 2017 (with introductory note by GWA on Gender and Media)
<http://globalforestcoalition.org/women2030-media-training-toolkit/>
4. **ToT on Gender Mainstreaming in IWRM, GWA (2002)**: Module 3 on Mainstreaming Gender in the Project Cycle, and Module 5: Gender Mainstreaming in Organizations and Policy Process.
<http://genderandwater.org/en/gwa-products/capacity-building/tot-modules>
5. **Gender in Sustainable Development: Collection of Exercises for Training of Trainers (ToT)**, EWA and WECF, March 2014
<http://www.wecf.eu/english/publications/2014/gendertrainingmanual.php>
6. **'Engendering Budgets: A Practitioners' Guide to Understanding and Implementing Gender-Responsive Budgets'** by Debbie Budlender and Guy Hewitt, 2006.
<http://gender-financing.unwomen.org/en/resources/e/n/g/engendering-budgets-a->

[practitioners-guide-to-understanding-and-implementing-genderresponsive-budgets](#)

7. **40 Tools for Institutional Development and Organisational Strengthening**, MDF Training and Consultancy BV, 2004
Includes several tools including a Gender Checklist (pg 94-102) which assesses organisational performance from a gender perspective
www.build.mk/docs/users/max/40t.pdf

Web Resources on Organisational Skills

*The **UN Women Gender Financing website** has lots of useful information and resources on gender financing*

English: <http://gender-financing.unwomen.org/en>

Spanish: : <http://gender-financing.unwomen.org/es>