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**THE PROCESS OF INSTITUTIONALISING  
GENDER IN POLICY AND PLANNING:  
THE 'WEB' OF INSTITUTIONALISATION**

**Caren Levy**  
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## CONTENTS

1.	How far have we come?	1
1.1	The WID-GAD debate	1
1.2	The development of methodology	3
2.	The notion of a 'web' of institutionalisation	4
3.	The elements in the web of institutionalisation	5
4.	The use of the web in the gender and planning methodology	12
4.1	The use of a web as a diagnostic tool	13
4.2	The use of a web as an operational tool	13
4.3	Who is weaving the web?	15
	Notes	16
	Annex 1	20
	References	24

# THE PROCESS OF INSTITUTIONALISING GENDER IN POLICY AND PLANNING: THE 'WEB' OF INSTITUTIONALISATION

## 1. How Far Have We Come?

Events like the Fourth UN Conference for Women which was held in Beijing in September 1995 help to focus the mind on issues like 'how far have we come?' and 'where are we going to?' Thus, while many are working towards setting and implementing new agendas for the millennium, the experience gained since the first formal national and international commitment to Women in Development in 1975 is also being reviewed. Despite 20 years of international, national and local activities on behalf of women, it is clear that most development activities continue without explicitly considering half the population as active participants in development - even when empirical evidence has shown that women are key actors in all development spheres, on their own, collectively with other women or with men.

This observation reflects the critical question of concern in this paper: how to institutionalise or sustain change related to new perspectives in the practices of governments and other organisations involved in the development process. The term 'institutionalisation' has been widely used in relation to integration of women or gender<sup>1</sup> into regular development practices. The fact that a women or gender perspective has only very rarely been institutionalised in these practices suggests that both the conceptual underpinnings and the practical activities around institutionalisation need to be further explored.

Institutionalisation is defined as 'the process whereby social practices become sufficiently regular and continuous to be described as institutions', that is, 'social practices that are regularly and continuously repeated, are sanctioned and maintained by social norms, and have a major significance in the social structure'(Abercrombie, Hill & Turner, 1988,p 124). In this sense, institutions denote the underlying and regular practices of organisations in all sectors<sup>2</sup> and at all levels of society. Thus, the term contains within it two important concepts: that of the room for manoeuvre which individuals and their organisations have to generate change, and that of the notion of sustained change<sup>3</sup>. Both concepts challenge the possible rigidities and lack of responsiveness that could be associated with the term 'institutionalisation', which might be viewed as reflecting pre-determined and fixed practices. Moreover, the concept of 'sustained change' adds a useful dimension to a definition of institutionalisation since it recognises the basic conflict between the regular practices of organisations which inevitably reflect a particular set

of interests, and their responsiveness to change reflecting other power relations and interest configurations.

Thus, as in the case of other social relations, the institutionalisation of a gender perspective implies the integration of a dynamic social relation which has at its heart the question of power. This paper attempts to deal with two critical issues in relation to addressing the power underlying gender relations. Firstly, how can one define the room for manoeuvre of agents, individuals and their organisations, in their attempts to 'genderate' (my adaptation) change? Secondly, under what conditions can a gender aware perspective, a perspective which reflect power relations that are different from those that continue to exist in most development practices, be taken on and sustained to the point that it can be said to be institutionalised - and remain responsive to the variety of women and men's experiences and interpretation of reality?

In exploring these questions, in this paper I would like to share a particular diagnostic and operational framework for the institutionalisation of a gender perspective in development policy, planning and practice. This framework evolved out of my participation in the teaching, training and advisory work of the Gender Policy and Planning Programme at the DPU as well as out of a review of the practice of others<sup>4</sup>. Two main paths of ideas and practice influenced my development of this framework.

### 1.1 The WID-GAD debate

The first relates to what can be termed a paradigm challenge to the Women and Development (WID) approach by Gender and Development (GAD). As has been widely discussed, the WID approach, which first emerged out of the First UN Conference for Women, 1975-1985, has not reflected a homogeneous policy over the last 20 years. Buvinic (1983), Moser (1993), Young (1993) and others have highlighted how WID policy, influenced by the wider development policy paradigms, has changed since the beginning of the UN Decade, and differs from country to country, from Ministry to Ministry, and even from department to department, depending on the predominating development policies in particular contexts<sup>5</sup>. Nevertheless, there are a number of common threads in the WID approach.

The first is that they all focus on women as an analytical and operational category. This reflects the translation of the political focus of women, one of the most important movements of our century, into

professional practice in government and non-government organisations. Related to this focus, a second is that, the organisational form this has taken has been the establishment of separate structures - Ministries of Women's Affairs (eg Bangladesh), Departments of Women's Affairs (eg Namibia), National Women's Commissions (eg the Philippines), in many cases with women's desks in various Ministries. This has been mirrored in international agencies and many NGOs with the establishment of separate women's sections. A third characteristic follows from the previous two. These separate structures were given the mandate for women - usually about half the population of the country or the client group - as if women were not involved in or affected by the activities of other Ministries, Departments or Divisions. A fourth characteristic is that the primary means of intervention of these separate structures has been women-specific policies, programmes or projects. A fifth common characteristic is that these separate structures, whatever their exact form, have been severely under-resourced relative to other government expenditure.

The final thread linking the WID approach internationally is its impact. As the previous characteristics might suggest, these have been twofold. On the one hand, over the last 20 years we have seen the creation of a women's sector. This is reflected in the flow of resources in and between international, national and local agencies and organisations concerned with WID. On the other hand and with few exceptions, in all the countries, agencies and organisations in which it has been adopted and institutionalised as part of this sector, WID has remained marginal to the mainstream development activities of governments (Levy, 1991; Moser, 1993; Kabeer, 1994). This is not to say that some WID structures have not been involved in some successful activities, both in-country and at the international level. However, when measured in terms of their impact on the regular activities of international and government agencies, the extent to which women's roles are recognised and incorporated into actions is either absent or is present in an ad hoc or an 'add-on' way. In retrospect, it is clear that while WID has institutionalised itself, it has not institutionalised women in the practices of development agencies. This critique has provided the basis for the emergence and growing commitment at national and international levels to the GAD approach.

Like WID, GAD is also not a single approach, and even in its relatively short life<sup>6</sup>, a variety of perspectives have emerged. While GAD Integration and GAD Equity are explicit policies in some organisations, the way a gender perspective is being treated in some planned interventions reflects, often implicitly, GAD anti-poverty and GAD efficiency approaches, which are distinct from the

previous WID approaches of the same name. Nevertheless, there are some common threads within the GAD approach which clearly indicate primarily its differences from, but also some similarities to WID.

A first is that all GAD approaches focus on gender relations as an analytical category. This is usually based on an understanding of women and men's roles, responsibilities, and access to and control over resources. Within the basic conceptual framework of gender relations, some differences appear to have emerged concerning the emphasis given to women or women and men, particularly in operational terms. Despite these differences, most GAD approaches recognise the sub-ordination of women and consider to various degrees the implications of power in gender relations in the analysis and operational aspects of their methodology. A second is that the organisational form for implementing GAD is a combination of separate structures<sup>7</sup> and the creation of gender competence among staff of existing structures. A third common characteristic among GAD approaches is that the mandate for these separate GAD structures is not for half the population or client group as in the case of WID, but to act as a catalyst for the integration of a gender perspective as a regular part of the practice of all development activities<sup>8</sup>. The development of skills to integrate gender into interventions in all sectors is one mechanism for achieving this. A fourth is that the form of intervention in terms of women specific interventions or integration into mainstream interventions, is not an 'either... or' within the GAD approach, but a matter of strategic choice. Thus in some contexts, women or men-specific interventions may be appropriate, while in other situations, gender integration into mainstream sector specific interventions may be appropriate (Levy, 1992). A fifth characteristic which GAD has in common with WID is that in most instances, the GAD initiative also continues to be under-resourced<sup>9</sup>.

It is too early in the life of GAD to make generalisations about its impact. As all the characteristics above indicate, GAD is a challenge to the women's sector created by WID. If GAD is also becoming a sector, as some suggest, then GAD is being substituted for WID, and none of the conceptual and practical implications of the concept of gender and its integration into development practice is being addressed in a manner implied by the common characteristics discussed above. Moreover, if GAD is de-politicising the institutionalisation process, as others suggest, it is not acknowledging the power relations underlying its very conception, nor the links between GAD and the pressures for change through political action.

Only a limited number of evaluations of the practices of GAD have been undertaken to date<sup>10</sup>, and it is not yet clear whether it will be successful in breaking out of the women's sector and institutionalising itself. What is clear is that one of the key issues in the successful implementation of GAD is the development of an appropriate methodology which can initiate and sustain a gender perspective in mainstream development practices.

## 1.2 The development of methodology

The second path in the development of this framework for the institutionalisation of gender has been a concern with the methodological implications of this shift from WID to GAD, or more specifically, of taking on gender as a cross-cutting issue in development policy and planning<sup>11</sup>.

The abiding question that has to be faced when taking on a new perspective is: to what extent can gender as a variable be integrated into existing policy and planning methodologies? or does introducing gender as a variable challenge the basic assumptions of existing methodologies and therefore alter them fundamentally?

As will be discussed later in this section, taking on a gender perspective does bring certain basic issues to the fore which do challenge the assumptions underlying many methodologies. However, this argument cannot escape the implications of the intersection of gender relations with other social relations, like class and ethnicity, and ones' values and approaches to those social relations in society<sup>12</sup>. This becomes apparent when examining the work done on development policy and planning methodology. In broadly reviewing the trends in this work, I find it useful to see methodology itself at three levels of abstraction, that is, at the level of the definition of analytical categories, at the level of the process of intervention and at the level of techniques<sup>13</sup>.

At the level of the definition of analytical categories, over the last 20 years an enormous body of knowledge has emerged, generated by academics and researchers working at the interface of theory and methodology. This body of knowledge reflects the contributions of those working from a women's studies perspective (that is, putting 'women' back into 'people' in a range of human activity, including history, literature etc) as well as from a gender perspective. As indicated in the previous section, the use of women or gender as an analytical category is also mirrored in the development literature. This work has challenged the basic analytical categories of a range of development theory and methodology<sup>14</sup>, but from different theoretical approaches to society, whether these have been made explicit or not. These tend to fall into four broad categories of social theory:

consensus, pluralist, conflict and deconstruction theories of society.

Dating from prior to institutionalised WID, trends in this work can also be seen relating to the level of the focus and the topic. In the early days, based primarily on the work of social anthropologists, work dealing with micro level gender issues predominated. The mezzo and macro levels followed in the late 1970s and 1980s, and while research and conceptual development has continued at all levels, the 1990s has seen a much more systematic critique of macro economic theory and methodology. Moreover, while the topic of much initial work focused on rural development, the body of knowledge on women/gender issues in urban development expanded enormously from the 1980s<sup>15</sup>.

What has been less systematic at an academic level has been the examination of gender issues in planned intervention, whether at policy, programme or project levels. That is not to say that there is no body of knowledge on this topic. However, it is largely confined to internal or consultant reports for funding agencies, many of which remain internal documents<sup>16</sup>. Given the nature of the reports, they also do not systematically question the definition of analytical categories related to the interventions. Moreover, while 'institutionalisation' of gender issues is often a phrase mentioned in both reports and academic/research work in this area, a systematic treatment of this issue at the interface of theory and methodology is still embryonic<sup>17</sup>.

The discussion in the previous paragraph links into policy and planning methodology at the second level of abstraction, that of the process of intervention. The focus at this level of abstraction is on the constituent parts of policy and planning, and the way these parts are put together to make up policy-making and planning processes. In the first 10 years of WID, and the early stages of GAD, the associated process was largely the use of the project cycle, with women or gender<sup>18</sup> 'factored in' at its various stages. The project cycle itself as a process went largely unchallenged. Thus, the tools developed were largely analytical, that is, where to factor women (in the case of WID) or gender (in the case of GAD) into already fixed operational steps. The exception was NGOs who were committed to participation, and whose concerns to integrate women in decision-making in projects led them to question not only the components related to each stage of the project cycle, but to the rigid circular nature of the project cycle itself.

By the end of the First Decade and into the Second, some WID structures in government had taken up the challenge of creating national policies or plans for women. Again this activity largely involved 'factoring women into' the various traditional

processes associated with policy and planning. Both in the project cycle and in traditional policy and planning processes, the issue of institutionalisation of women (in the case of WID) or gender (in the case of GAD) has been discussed but largely remains devoid of real content.

My own work within the DPU Gender Policy and Planning team has focused on the development of a gender policy and planning process which challenges traditional approaches in a number of ways. While a more detailed discussion of this work appears elsewhere<sup>19</sup>, some key issues are important to the argument in this paper. Since gender relations represent a set of power relations, it seemed unlikely that any policy or planning process to integrate gender into development activities would be linear in nature. Rather it would be iterative, driven by what I have termed 'entry strategies' responding tactically to resistance and openings for change as they arise or are created by different agents. These entry strategies fall into and strengthen any of four components which make up the gender policy and planning process. Given the iterative nature of the process, monitoring is an essential component to keep interventions relevant and to 'learn' from experience. Gender consultation, both with client groups and with practitioners in the organisations involved, is seen as another central operational component in the process. Similarly, a concern for organisational development, often excluded from traditional planning approaches, is also seen as a central operational component. Gender diagnosis, a fourth central component, therefore has to comprise tools to provide ongoing diagnosis of an intervention and its context which can complement all the previous components. It is primarily in this context that the diagnostic and operational framework for assessing and promoting the institutionalisation of gender, the focus of this paper, was developed.

The third level of abstraction of methodology is that of techniques. Each component within policy and planning processes has particular techniques associated with it. For example, in the project cycle, quantitative and sometimes qualitative research techniques are amongst the methods employed in the identification component, while cost-benefit analysis is a technique associated with the appraisal component. Despite their essence in any planning and implementation process, the work done on the integration of gender into various policy and planning techniques remains ad hoc<sup>20</sup>. Moreover, techniques related to the diagnostic and operational aspects of institutionalisation of gender remain explorative in nature.

Thus it is clear that the issue of institutionalisation of a gender perspective is an underdeveloped area in policy and planning methodology. This is perhaps in part because it is an underdeveloped area in policy

and planning methodology itself. However, it is also because the attention of those involved in WID and GAD has only really started to address this issue at the turn of the Fourth UN Decade for Women.

## 2. The Notion of a 'Web of Institutionalisation'

In this paper it is proposed that the conditions under which gender can be institutionalised, are represented by at least thirteen elements. Each element represents a site of power. Gender relations and their intersection with other social relations, are located at a variety of different site of power in any particular institutional context and its organisational landscape<sup>21</sup>. Given the power relations underlying these elements, both opportunities and resistance may confront collective action which addresses changes within each element. The expression of power in each of these sites is understood not only as visible products and practices of organisations, but also in the invisible values and motivations which influence and shape these more tangible outputs of organisations. In this sense, underlying each element is a series of 'organisational cultures' associated with the organisations relating to the element. Organisational culture, as Newman defines it, is the 'shared symbols, language, practices ... and deeply embedded beliefs and values'. Each of these domains has to be understood as gendered, and together they constitute an important field in which gendered meanings, identities, practices and power relations are sustained'. (Newman, 1995, p 11).

These elements provide a means not only for guiding and even structuring a diagnosis of an existing situation<sup>22</sup>. Once assessed, they indicate room for manoeuvre for change and can provide a means for directing action to promote institutionalisation.

Moreover, these elements are not merely a listing of variables or entry points. I see them as a web, in the sense that they are linked and interrelated in a particular way and ultimately they re-inforce each other. Sustained institutionalisation of gender issues requires the co-existence of all elements. Putting into place one or a group of elements will almost certainly be unable to sustain gender as a regular part of development practice in the long term. Three further characteristics of the web are critical.

Firstly, the actual form the elements take is context-specific. Thus their substantive content may change not only in different political and socio-economic conditions, but also over time. In different contexts and at different times, the form of the elements and ultimately the form the web takes may be unique. Therefore, the strategies for institutionalising gender in different contexts may be quite different. The

replicability of action lies not in the form of the elements and the content of the strategies to put them into place, but in the application of the methodological 'tool'.

Secondly, although each element is present in the activities of different groups, actors or agents, the form the element takes may differ for each.

Typically, groups may be drawn from the international, national and local arenas. Similarly with respect to other issues, groups within and between each level may have different approaches to gender as it relates to each element, resulting in different opportunities and resistances, and in a different scope for change.

Thirdly, these elements are operated, put into place and shaped by different agents or groups of people in a range of interrelated spheres of activity. Elsewhere I have defined these spheres as political, organisational, technical and research (Levy, C, 1992), with some women and men operating in more than one sphere. The critical point here is that as an individual one may only be able to influence some of the elements, depending on one's role, position and power to influence change at a particular point in the web. Putting all the elements in the web in place requires collective action through conflict resolution, co-operation, consultation and negotiation at different levels (local, national and international) between the relevant actors. The nature and possible forms of that collective action will be discussed later.

A final comment is necessary. The importance of many of these elements have been recognised individually by many working in this field. Indeed eloquent and sophisticated research and writing can be found on some elements, either individually or in groups<sup>23</sup>. This work is critical to further our understanding of each element. However, it is not the purpose of this presentation to cite and discuss this work in detail. Rather it is to present these elements in a particular relation to each other - in the form of a 'web'. The discussion will touch on relevant literature only to the extent that it is pertinent to the particular arguments in relation to the development of the 'web'.

### **3. The Elements in the Web of Institutionalisation**

The sequence of presentation of these elements does not indicate a sequence for applying the 'web' in practice. As discussed above, the form the elements take is context specific. Moreover, since the elements are part of a web, in principle one could start anywhere. However, the logic in this presentation will soon become apparent to the reader.

I will start with women and men in 'communities'<sup>24</sup> themselves, that is, women and men's experience

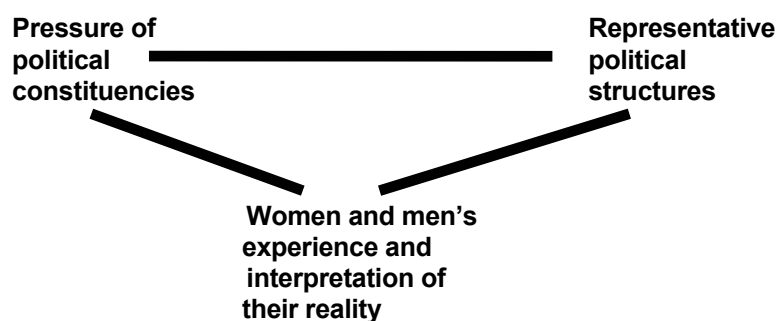
and their interpretation of reality. The choice of words here is important - not planners or development experts interpretation of women and men's reality, but their own interpretation of their lives. Over the last 25 years, a range of theoretical perspectives on how to understand this experience and interpretation of reality have emerged<sup>25</sup>. The DPU Gender Policy and Planning Team and its associates use the analytical tools of the gender roles played by women and men, girls and boys, their different access to and control over resources and the extent to which they are able to meet felt gender needs in a particular context. In the context of this discussion, this is only a debate about the merits of these different approaches to the extent that they recognise the principle of women and men in communities and organisations interpreting their own realities, and the role of power relations in this process.

To promote the institutionalisation of a gender perspective, the expression of the gender interests related to women and men's gender roles, access to and control over resources and gender needs<sup>26</sup>, must go beyond the level of random discussion. They must be expressed at the level of collective action in the political arena, and thus link to two more elements in the web.

Through mobilisation and consciousness-raising amongst women and men by a range of possible processes<sup>27</sup>, women and men can initiate collective action around particular gender interests, forming new or joining with existing political constituencies. In this process, women and men act in their constituency politics roles<sup>28</sup>, facing a range of gender, class, age or ethnic constraints (see, for example, Levy, C 1991, Moser 1989), and an understanding of these constraints on the constituency politics roles of women and men is crucial to contributing to the reinforcement of this element. It is the pressure of these political constituencies that is critical to ongoing institutionalisation. The distinction made by Molyneux (1985) between practical and strategic gender interests is very useful here in identifying the different constituencies around gender issues, making it possible to identify



FIGURE 1



competing or complementary interests at work which may affect the strength of the pressure of these political constituencies.

However, the pressure of political constituencies is not enough. For sustained gender institutionalisation, women and men have to be able to elect and/or actively engage with representative political structures within the formal political system.

Otherwise their interests remain outside of formal politics. The term representative is used in two distinct senses here. The first relates to having equal numbers of women and men representatives in formal political structures on the basis of not only gender, but also class, ethnicity, religion and age, as appropriate to the context. The second relates to being representative in the sense of being reflective of the practical and strategic gender interests of women and men. Clearly these interests can be taken on by elected women or men, and the two senses of representativeness should not be confused, as they often seem to be. It seems obvious to point out that having women in power does not automatically lead to gender interests coming through in formal political arenas. Nor are all male politicians unable to represent the gender interests of women or men.

The re-inforcing triangle between these three elements is critical for sustained change (see Figure 1 above). Women and men's experience and interpretation of reality is linked to the pressure of political constituencies through mobilisation. Awareness or heightened consciousness of gender issues is a first step, but mobilisation of this awareness into collective action in the political arena is a crucial dimension in the institutionalisation of gender issues. Moreover, the pressure of these political constituencies must be brought to bear, through lobbying, on the representative political structures. The latter is also linked to women and men's experience and interpretation of reality through political accountability. Clearly in countries where there is no real political accountability and the pressure of political constituencies is not tolerated, these elements and the links between them reflect great political struggle - usually on a front much

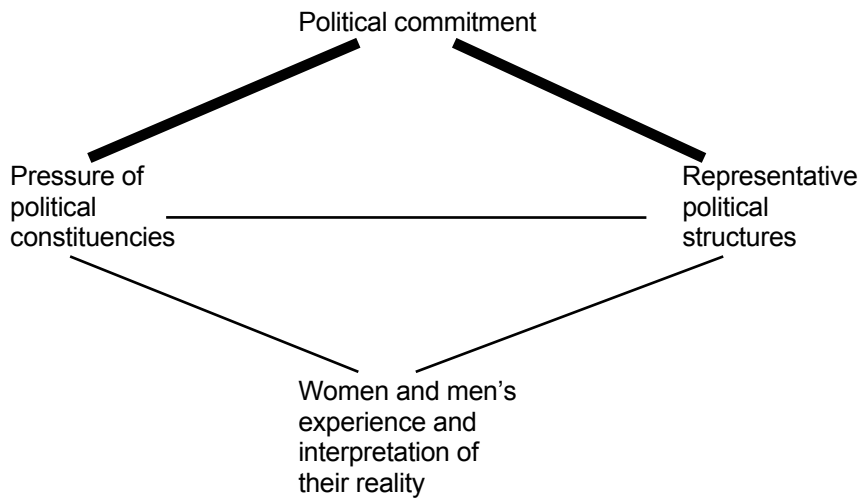
broader than gender issues, but one in which gender issues may be a pawn in or a victim of political compromises and change<sup>29</sup>.

This triangle overlaps with another triangle of elements in the political sphere (see Figure 2). To the extent that political constituencies and representative political structures can exert influence, through lobbying or direct action, gender issues can be translated into political commitment. Political commitment, though often cited in the literature as key to any change in political climate, is a 'slippery' concept. I refer to it here as the public articulation of a political intent or stand. For example, in the 1990 Brazilian election, a key politician addressed the Brazilian as 'Brazileiras' and 'Brazileiros'<sup>30</sup>. Similarly, Nelson Mandela, in his inaugural speech, made direct reference to the need to address gender issues in the new South Africa<sup>31</sup>.

Both these examples point to the successful pressure of 'gendered' political constituencies. On the other hand, statements about 'the family' and negative and punitive statements about single mothers in the UK set quite another tone<sup>32</sup>. While these are clearly only statements of intent, they set the tone for action, from which women and men in 'communities', as well as in development organisations inside and outside government take their cue, either in support of or against the tone and its implications for action. In this sense, political commitment to integrate gender issues is a critical element in institutionalisation.

However, dedicated political commitment is clearly not enough. The test of this commitment is in its translation into two further elements (see Figure 3). The first is policy. From the experience of the last 20 years, the form of this policy is important. On their own, specific and separate policies on women or gender have shown to be unsuccessful in directing gender integration into mainstream policy. Instead, they have usually ended up as a separate chapter in a national development plan (often a chapter at the end of the document) or in

**FIGURE 2**

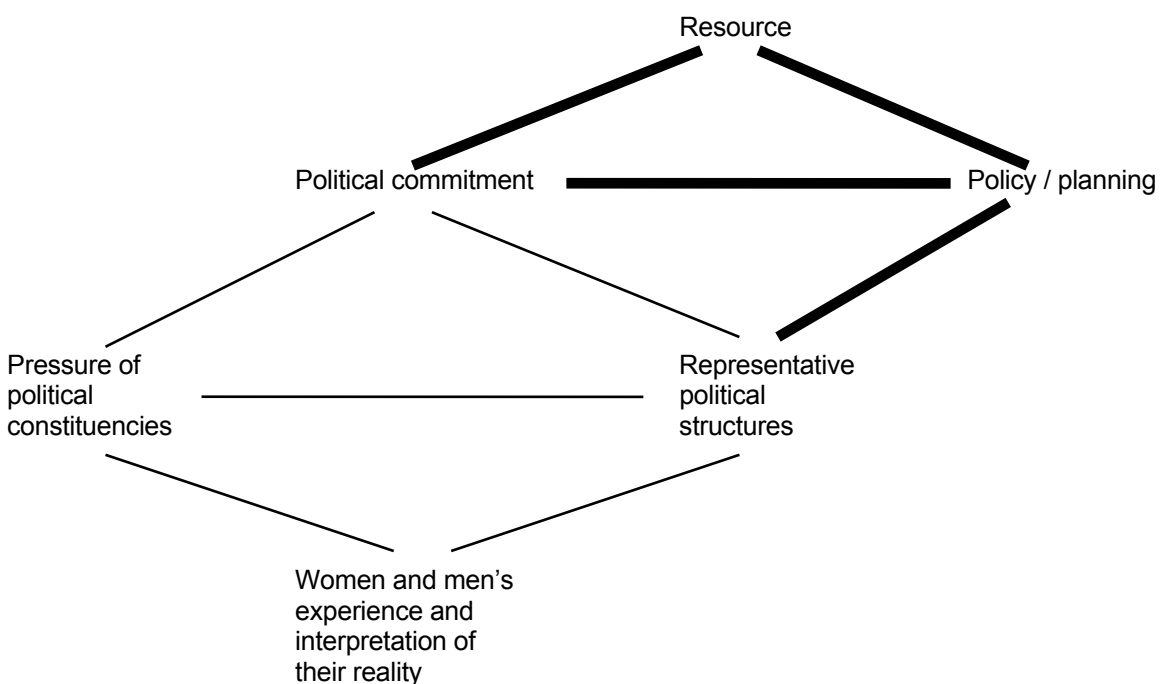


a completely separate national development plan<sup>33</sup>. There are grounds for arguing that separate policies are a necessary, but not sufficient, condition for gender integration. However, what is important to this discussion is not just the form of the policy, but its content and the process of making and implementing it. In this respect, one question is critical: to what extent has the gender specific policy addressed other sectoral - and where appropriate - other cross-sectoral policy (for example, the environment)? In the case of both gender specific and gender integrated policy, there are a range of analytical tools available to assess the content and implications of policy on the gender roles, resources and gender needs and interests of women and men<sup>34</sup>. The inputs from members of

representative political structures is one key element in the making of gendered policy. Further elements discussed in subsequent paragraphs also link policy to critical issues relating to the formulation and implementation of policy for sustained institutional change.

Political commitment also needs to be translated into resources to support policy. For example, many governments signed the UN Decade agreement in the 1970s, illustrating a degree of political commitment. Just what this commitment was worth became apparent when looking at the resources allocated to institutionalised WID in many countries. The financial amounts were minuscule in relation to budgets for other policy areas. However, from the perspective of gender

**FIGURE 3**



integration, this is no longer quite the point. Mainstream gender integration implies the use of existing policy and programme budgets, but in a gender aware way. Nevertheless, new and sustained resources for the promotion and maintenance of this kind of integration are critical. Taking an example of a bi-lateral aid agency, while the Gender Office in SIDA emphasised the use of existing country programme budgets for more gender aware development co-operation, they also had their own budget to initiate change. The latter were directed primarily at training and 'demonstration' projects<sup>35</sup>. The challenge for them was to train sector and country level staff to use their own budgets for the integration of a gender perspective into an ongoing programme, and to get demonstration projects to be taken over by the appropriate existing budgets. Thus, the three elements of political commitment, policy and resources re-inforce each other (see Figure 3 below). This triangle of elements also suggests a further critical element in the gender institutionalisation process.

The allocation of resources and the organisation of policy for gender integration depend fundamentally on the mainstream location of responsibility for gender issues. The experience of the UN Decade has highlighted how easily WID and now potentially GAD can be marginalised from mainstream development when a WID/GAD specific institution is created and mandated with the responsibility for half the population of a country - as if women were not participants in the activities related to other Ministries. A key element in successful institutionalisation is the clarification that the responsibility for women and men involved in or affected by the activities of a particular Ministry or organisation is its responsibility, and not that of a WID or GAD Ministry or Department. This implies a

fundamental challenge to the dominant organisational culture and the processes of intervention and techniques used by members of an organisation.

In other words, this involves getting across the notion that taking on the responsibility for integrating gender into their remit is part of 'good' practice, no matter the focus of the Ministry or the organisation. This notion can be promoted through gender integrated policies and through the allocation of resources to 'gendered interventions', in addition to any 'gender-specific' policy that may be necessary to support this process or any 'gender-specific' allocations that may be made. Similarly, as the triangle implies (see Figure 4), the clarity of mainstream responsibility for gender issues will re-inforce and support gender integrated policy making and resource allocation. Taking an example at the national level, Namibia has as one of its three national planning principles the commitment to ensure equal opportunities for women and men<sup>36</sup>. In the preparation of the First Transitional National Development Plan, it was clear that, with few exceptions, the Ministries prepared plans which did not reflect this - or any of the other two principles<sup>37</sup> - leaving the Department of Women's Affairs as the only chapter dealing with this principle (Chapter 26 of the Plan). Given the role of the National Development Commission as co-ordinator of the capital budget for the country, it fell to them to inform all Ministries of their responsibility for the policy principles of the National Development Plan and to insist that they be addressed appropriately in the preparations for the First National Development Plan. Thus, gender integration was encouraged using the regular budgets of the Ministries, with some money being raised from international donors for gender-specific programmes in some Ministries and in the Department of Women's Affairs<sup>38</sup>.

**FIGURE 4**

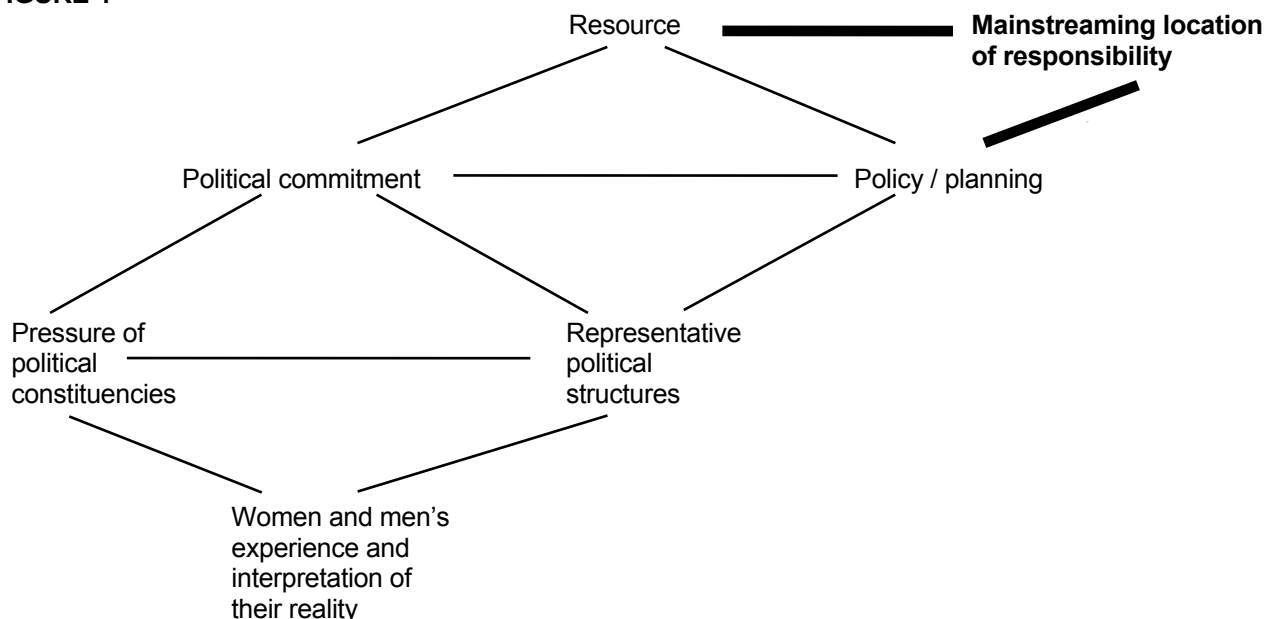
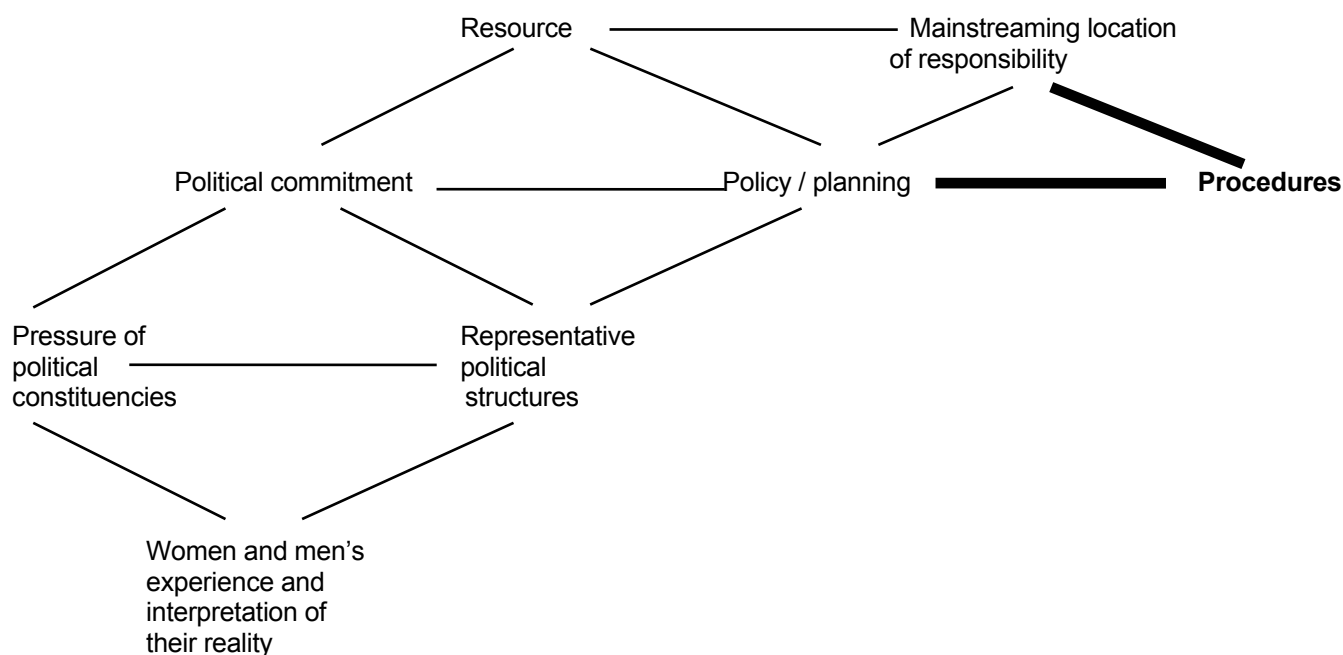


FIGURE 5



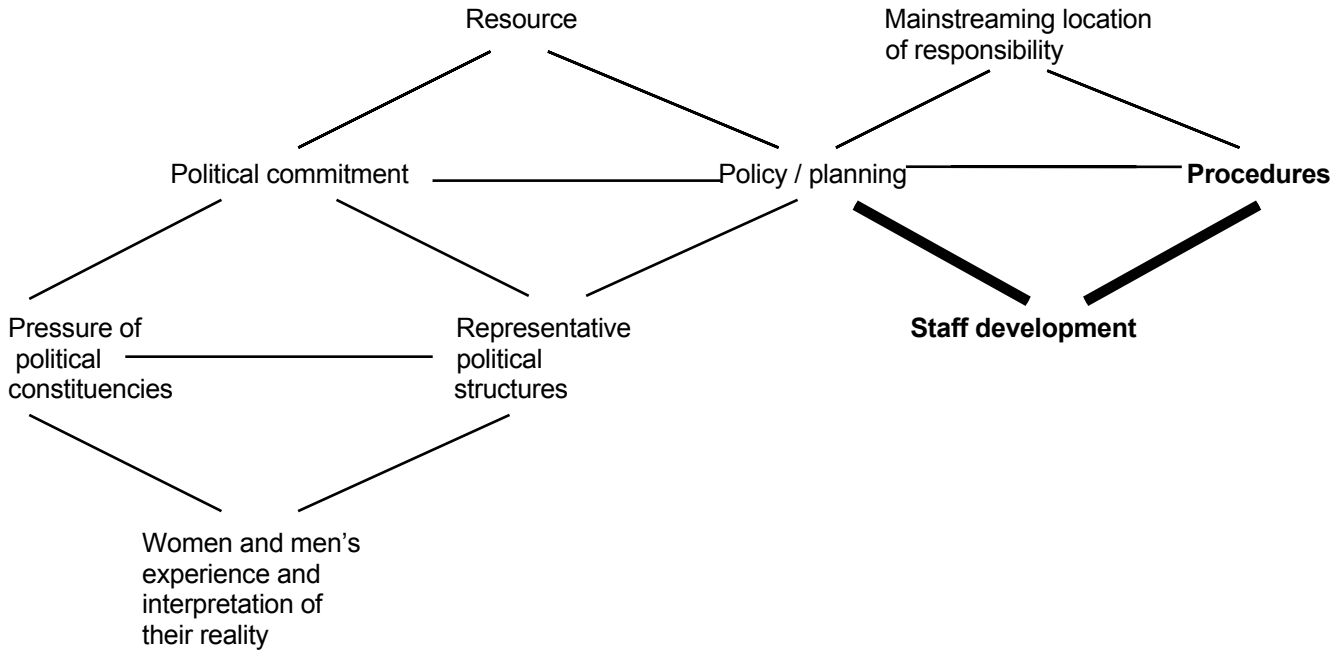
However, clarity of responsibility for gender issues and the making and implementing of gendered policy needs to be re-inforced by gendered procedures (see Figure 5). Procedures are the 'routinised' daily activities associated with different points of the programme/project cycle of an organisation or the rules governing actions within or between organisations and individuals. For example, terms of reference and memorandum formats, have long been identified as 'entry points' in bureaucracies for integrating a gender perspective<sup>39</sup>. However, in many cases, guidelines for integrating gender into terms of reference, for example, remain in WID Manuals rather than in the organisation's guidelines for terms of reference. Without gendered procedures, no matter how gender integrated policies are and how clear responsibility for gender issues are, the 'paraphernalia' of bureaucracy can undermine and block the institutionalisation of gendered interventions. This also highlights the importance of the technical accountability which links the mainstream responsibility for gender issues and 'gendered' procedures.

This leads to a key triangle for the implementation of policy (see Figure 6). Both policy and the interpretation of procedures will be limited without the appropriate staff development. In this discussion, staff development refers to two aspects: on the one hand, training in gender policy and planning skills for all professionals, both women and men; and on the other, equal opportunities for women and men as workers in the organisation eg in recruitment, access to training, promotion etc.

Much emphasis has been put on training as a means of promoting gender integration, particularly by international agencies. There is no doubt that there is a need to go beyond awareness of gender as an important variable in development, and to impart skills which can translate this awareness into concrete practice. By the same token, the experience of the last 10 to 15 years has also indicated that training on its own does not change practice in a sustained way, even if trained practitioners are committed to more gender aware change<sup>40</sup>. Considering existing power relations, putting women and men practitioners back into their organisations after gender training, where there is no clear gendered policy framework and/or where the procedures which govern their work on a daily basis are implicitly gender blind or explicitly obstructive to change, is a recipe for wasted training. If new skills are not used, they will soon be forgotten. In other words, policy, procedures and the training dimension of staff development re-inforce each other.

As has been widely recognised, staff development is also related to the progress of women and men workers through their organisation. This has less to do with the substantive content of policy and planning which governs the organisation's external practices, and more to do with conditions of work within development organisations, though the two are often unhelpfully confused. Despite the long recognition of the sex imbalances in most public, private and non-government organisations, and the acceptance of equal opportunity or affirmative action policies, these sex inequalities persist<sup>41</sup>.

**FIGURE 6**



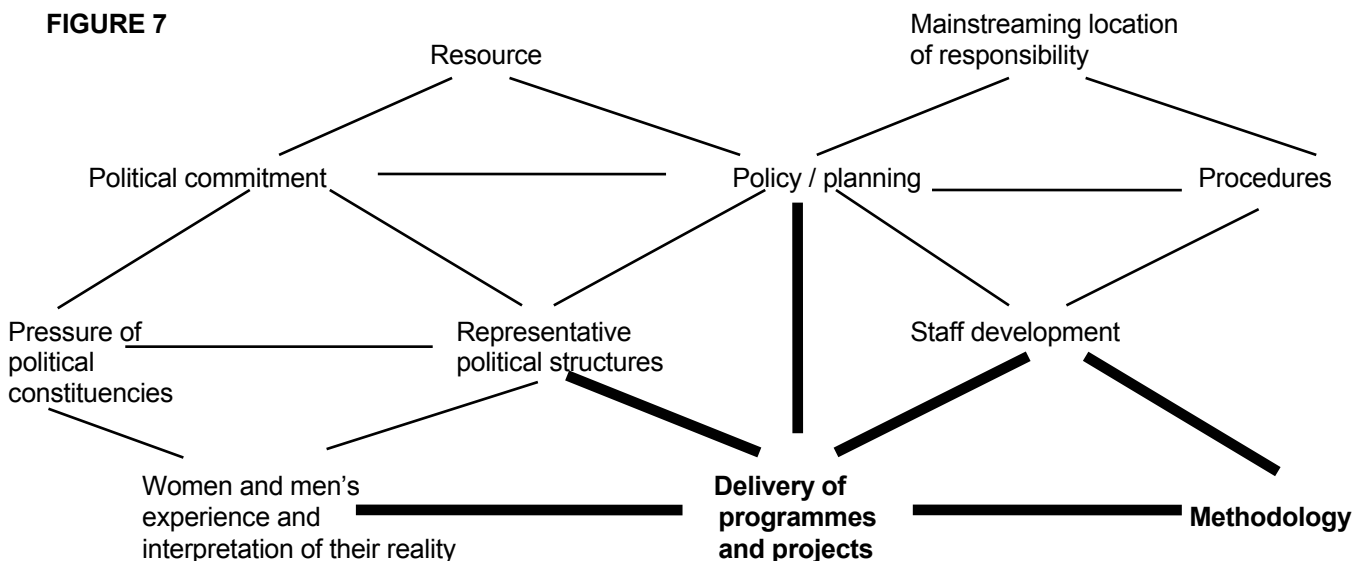
The actual treatment of women on an equal basis to men in organisations, is clearly interlinked with the existence of appropriate policy and of appropriate procedures, and together, these three elements reflect much about organisational culture<sup>42</sup>.

Recent work in this area is, in many respects, a mirror image of the experience of gender integration into the substantive issues of development intervention. New experience would suggest that the integration of affirmative action issues into policies and procedures dealing with work practices are more sustainable than are separate policies and procedures dealing with affirmative action<sup>43</sup>. As in the case of substantive development issues, this may be not be an 'either... or' (ie, separate or integrated), but an 'as well as', with emphasis on the content of policy and procedures and on the strategies to combine

and pursue separate as well as integrated versions of these elements alongside and reinforcing each other.

As the discussion of the two aspects of staff development already suggests, effective staff development, particularly training to integrate gender into the skills and practices of practitioners, requires a clear methodology (see Figure 7). With few exceptions, this element has been strangely neglected in many development organisations, even where training in gender issues is available. This partly reflects a lack of clarity about the implications of taking on new cross-cutting issues like gender (or the environment<sup>44</sup> for the current skills being used in organisations. This is the case even where new techniques are being introduced, like for example, what seems to be the now ubiquitous, logical framework analysis<sup>45</sup>.

**FIGURE 7**



'Clear' methodology implies methodology which has a clear rationale for the integration of gender into development practice as well as tools for operationalising gender issues in the work of practitioners. Without these characteristics, methodology will not be able to sustain change in the staff development activities of organisations. Moreover, methodology for training should not be confused with methodology for education. It is a concern for methodology to which a large part of the DPU's activities - including the discussion of this 'web' of institutionalisation - has attempted to contribute over the last 10 years.

However, ultimately if staff development through an appropriate methodology does not result in the actual 'delivery' of programmes and projects which meet the needs of women and men, then all development interventions are unsuccessful and certainly the institutionalisation of a gender perspective in development activities has also failed. This element is a pivotal point in relation to a number of reinforcing triangles (See Figure 7). Firstly, in addition to appropriate staff development and methodology, a supportive policy environment is critical to the formulation, implementation and management of gender aware programmes and projects.

Secondly, 'delivery' is put in quotation marks, as the term might imply a top down activity and this is not the intention. For effective institutionalisation, groups involved in the 'delivery' of programmes and

projects must include not only professionals and practitioners, but also women and men from communities. Moreover, the involvement of the latter is not just in terms of carrying out the plans of experts or of male dominated decision making structures<sup>46</sup>. If programmes and projects are to relate to women and men's experience and their interpretation of reality, their interests and needs must be actively reflected in decision making around the formulation, implementation and management of interventions through their involvement in representative political structures (Figure 7). These would include not just formal structures at a national level, but also at a local and programme/project levels. For example, in Sri Lanka, women were observed as being largely silent participants in important meetings<sup>47</sup>.

Further, for institutionalisation to retain its character as sustained change rather than as entrenched practices, 'public learning' is critical to the institutionalisation of gender issues<sup>48</sup>. Thus, effective 'delivery' of programmes and projects must be able to respond to the dynamic reality of women and men's experience and interpretation of that changing reality. 'Applied' research can be a critical re-inforcing element here (see Figure 8). For example, gender sensitive participatory research techniques<sup>49</sup> can empower women and men in communities, promote the 'ownership' of activities, as well as act as a monitoring and feedback mechanism for the better delivery of programmes and project by development practitioners.

FIGURE 8

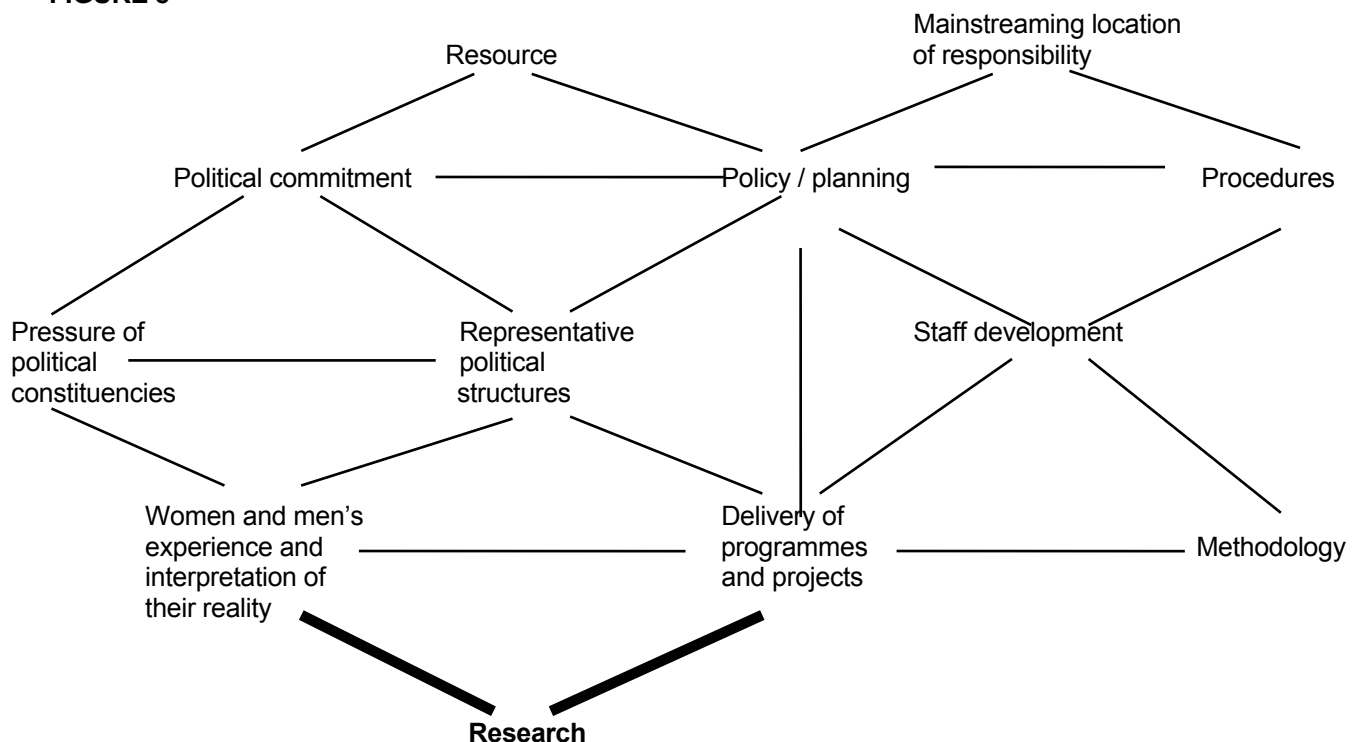
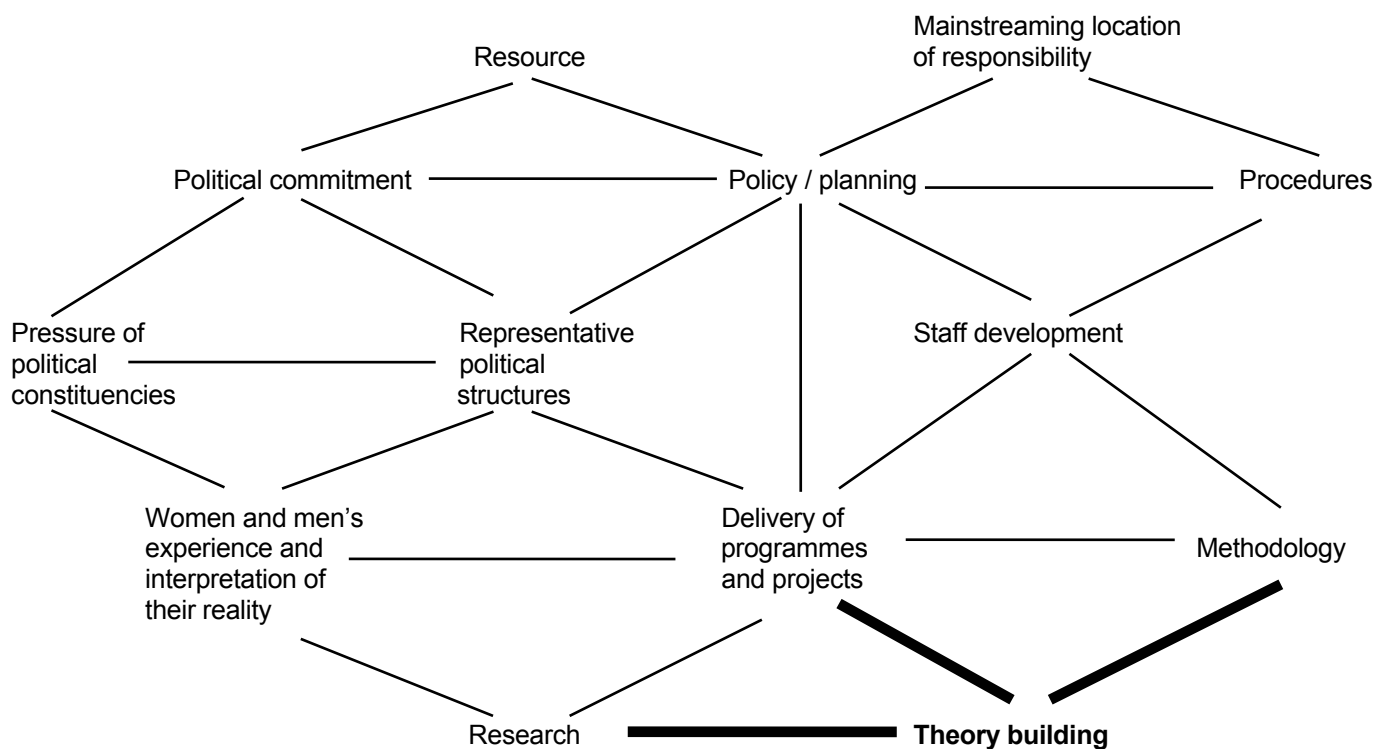


FIGURE 9



Finally, 'applied' research, in its examination of practice, also contributes to the accumulation of knowledge about the integration of gender in the practice of policy and planning. In other words, it contributes to theory-building around gender as a variable in development policy and planning which inter-relates with the development of methodology (See Figure 9). Clearly, theory-building takes place at the level of disciplines in different parts of the world and in different fields<sup>50</sup>. As discussed elsewhere in this paper, it has a direct inter-relationship with methodology. Further, it not only re-inforces 'applied' research but also practice and the delivery of programmes and projects, including the education of the next generation of practitioners and researchers, a key aspect of long term institutionalisation.

#### 4. The Use of the Web in the Gender Policy and Planning Methodology

As introduced in the discussion of the notion of the web, this framework can be used to look at the extent of gender institutionalisation at a country level or in one organisation, for example, a bi-lateral aid organisation, a Ministry or an NGO. Even in the case of the latter, in addition to being a means to evaluation the internal performance of the organisation, key groups in the operating environment of the organisation, its client groups and its partner organisations, and their performance with respect to each element will have implications for both a diagnosis of how far

the organisation has institutionalised a gender perspective and for how to take action to strengthen the institutionalisation process in the future.

In this sense, the web can act as both a diagnostic and an operational tool.

Indeed, returning to the three levels of abstraction within methodology, at the level of the definition of analytical categories, a series of elements in a particular set of relations have been proposed as key sites of power in a process of institutionalisation<sup>51</sup>. At the level other process of intervention, the web is a key part of the component of gender diagnosis. It can also act as an operational tool in guiding entry strategies for gender consultation, organisational development, and monitoring and impact assessment. At the level of a technique, it has been extended into a specific set of questions within the context of the gender policy and planning methodology which can be adapted and applied according to the needs of the user. At all three levels, the web can be used as a diagnostic or an operational tool.

#### 4.1 The use of the web as a diagnostic tool

As a diagnostic tool, the web is one of the techniques in the gender diagnosis component of the gender policy and planning methodology. The starting point of the gender diagnosis is related to the needs of the user. Firstly, at what levels is the assessment of the extent of gender institutionalisation being made? at the level of an organisation and the relevant groups in its constellation? at the level of a sector, for example, the education sector in a country? or at the level of a

country? Each level represents a possible layer of the web, with different groups performing in a range of possible ways with respect to each element.

Secondly, is the user assessing the impact on gender institutionalisation of a particular set of actions, for example a training strategy? Is the user trying to assess the impact of their sphere of influence, defined by perhaps only a limited number of elements, for example, a user at policy level or a user working with implementation and the delivery of programmes and projects? This will determine with which elements the diagnosis starts. And although it is unlikely that the user will have an influence over all the elements, it is clear that all the elements work in some way to define the room for manoeuvre of the user. It is therefore important for diagnostic purposes to understand what is going on for each element in the web, and what implications that has for the user.

The extent to which each element is in place is, of course, context specific. However, in every context, a set of questions relating to each element can be asked in order to assess the extent to which a gender perspective is present in its performance. These questions derive out of the first set of tools in the gender diagnosis which are based on the conceptual rationale that because women and men have different gender roles and different access to and control over resources, they have different gender needs. Figure 10 shows the relationship between the set of questions that derive out of the rationale for gender policy and planning, and the elements of the web. Annex 1 shows the result in detail for each element.

It is sometimes useful to group elements in the web for diagnosis according to the groups of people particularly concerned with their operation, and then bring everyone together to explore the 'big picture'. Thus, for example, in an organisation, those at policy and management levels could focus on assessing the operation of decision-making/political structures in the organisation, political commitment, policy, resources and location of responsibility for gender, while implementers could focus on the delivery of programmes and projects, women and men's experience and interpretation of reality etc, while a third group could look at issues around procedures, staff development and methodology<sup>52</sup>. Clearly this is most easily done at the level of an organisation, but with strategy and co-ordination it can be done at the level of a sector and even at the level of a country.

Out of the questions focused on each element, problems which reflect where gender institutionalisation is not working and potentials which reflect possible opportunities or avenues for change, can be identified. This then links into the use of the web as an operational tool.

#### **4.2 The use of the web as an operational tool**

Based on the particular form which the elements take in a particular place and time, the web can also be used as an operational tool, that is, to guide the direction of actions which can be taken to reshape elements to strengthen the web and thereby promote the institutionalisation of gender. Not only will the form of each element be unique in each context, but the courses of action will be unique. Thus, they will comprise a unique set of entry strategies falling within and strengthening the components of gender diagnosis (for example, undertaking further research), gender consultation (for example, seeking ways to consult with particular groups of women who may not be visible in traditional decision-making structures), organisational development (for example, training particular target groups to give them gender policy and planning skills) or monitoring (for example, defining indicators to trace the progress and impact of various actions).

However, confronted by the web and a list of problems and potentials relating to each element, the obvious question is where does one begin? Firstly, who 'one' is, is clearly important. Not all individuals, groups or organisations can influence every part of the web. It is important to understand the power one has to influence which elements. Some individuals, groups or organisations, may be able to influence different parts of the web by virtue of wearing two different hats, for example, by being both involved in politics and advocacy work as well as development work. However, while diagnostically, it is important to understand what is going on with respect to each element of the web, so that one can be more effective in shaping the elements within your sphere of influence, operationally it is important to define clearly 'your sphere of influence'.

Secondly, problems and potentials have to be prioritised. The configuration of the web is not a cause and effect hierarchy, it does not indicate a starting element. Indeed, depending on the sphere of influence of individuals, groups or organisations, there may be a number of starting points relating to a number of different elements. Thus some form of prioritisation is necessary. As the third technique in a gender diagnosis, I have proposed creating a cause and effect hierarchy of problems, which may help to refine the definition of problems and even highlight problems which were not identified in the preliminary use of the



**FIGURE 10**

**RELATIONSHIP BETWEEN KEY QUESTIONS TO ASSESS POLICIES, PROGRAMMES AND PROJECTS AND THOSE TO INSTITUTIONALISE GENDER**

**Key questions to assess policies, programmes and projects from a gender perspective**

To what extent do the different roles of women and men in different household structures have implications for

- the way problems are defined and analysed
- the interventions are formulated,
- implemented, monitored and evaluated?

To what extent do women's and men's different access to and control over resources have implications for

- the way problems are defined and analysed
- the interventions are formulated,
- implemented, monitored and evaluated?

To what extent do women's and men's different gender needs have implications for

- the way problems are defined and analysed
- the interventions are formulated,
- implemented, monitored and evaluated?

To what extent does the overall policy framework in which the intervention takes place, impact differently on the gender roles, resources and gender needs of women and men?

To what extent do specific WID/GAD policies address particular gender roles, resources and gender needs?



Source: Levy, C. *Gender Policy and Planning Training*, 1995.

web<sup>53</sup>. Similarly, potentials are categorised into those which can be immediately transformed and those which are longer term. Based on the problems and potentials which are targeted for action in this way, entry strategies are developed for implementation<sup>54</sup>.

The extent to which entry strategies are successful in strengthening particular elements in the web can be monitored. Similarly, changes brought about by 'external' influences can also be monitored, ensuring that the gender diagnosis is kept up to date and that responsiveness to new problems and potentials is maintained. In this way change can be sustained<sup>55</sup>.

### **4.3 Who is weaving the web?**

In presenting the web to different audiences or participants in training workshops, the question

almost always asked is: 'where is the spider'? While the location and form of 'the spider' depends on the context, it is highly unlikely that 'the spider' will be one person. It is almost always likely to be a group of people in some kind of organisational structure, inside and/or outside government. Thus, the 'brain' for strategically orchestrating the re-inforcement of the different elements in the web requires a level of conscious collective action by women and men in different parts of the organisational landscape. Moreover, it is clear that this collective action needs to take place at a number of different levels: locally, nationally, regionally and internationally. Among the leaders should surely be the women or gender specific organisations inside and outside government. However, the very definition of successful gender institutionalisation is that, in time, the incorporation of a gender perspective becomes a regular part of the practice of all development practitioners.

## NOTES

<sup>1</sup> In this paper, when I use the phrase 'women and gender' I am not using these words interchangeably, but rather acknowledging that some work with a women focus while others in the field work with a gender focus.

<sup>2</sup> That is, the public, private and community/social sectors.

<sup>3</sup> The importance of this notion of 'sustained change' was emphasised with me in discussion with Rona Rapoport in relation to on-going action research in large US corporations, and the choice of the team to use the term 'sustained change' instead of institutionalisation. The team has recently produced a draft report of their work (Bailyn and Rapoport, 1996).

<sup>4</sup> In addition to teaching and training in London, the DPU has been involved in several long term training and advisory programmes with a range of international agencies (SIDA, NORAD, ODA/British Council, EU), NGOs (Ibis, WUS, Plan International), foundations (Ford Foundation) in a number of countries (including Brazil, Colombia, Egypt, Ecuador, Mozambique, Namibia, Nepal, Palestine).

<sup>5</sup> The links between the policy approaches to women/gender and the dominant development policy debates have been explored by a range of authors: economic growth models and pre-WID welfare (for example, Buvinic, 1983; Moser, 1989 and 1993; Young, 1993); WID Equity (Buvinic, 1983; Moser, 1989 and 1993); WID Anti-Poverty (Buvinic, 1983; Moser, 1989 and 1993); WID Efficiency (Moser, 1989 and 1993); state socialist development and emancipation (for example, Beall and Levy, 1993); Molyneux, 1985); NIEO and empowerment (for example, Beall and Levy, 1993; Sen and Grown, 1988); sustainable development and gender integration (for example, Beall and Levy, 1993).

<sup>6</sup> While a concern with gender relations in development can be traced back to the late 1970s, particularly in the debates of feminist academics, eg Whitehead (1979), it was only in 1988 that SIDA, the first development organisation to start the process of the institutionalisation of a gender perspective, began the process.

<sup>7</sup> It is important to recognise the need for a dedicated organisation or group to initiate, strategise and support the institutionalisation of gender in the mainstream development activities of organisations. There has been a tendency in some organisations - either cynical or naive - to equate the acceptance of a gender perspective with the abolition of 'old' WID structures, rather than their transformation into new functions. The result has been the undermining of both women and gender issues in the organisations activities.

<sup>8</sup> For example, SIDA along with other organisations, changed the name of the WID Office to the Gender Office. This was much more than a change of name. It also reflected a change of role and function.

<sup>9</sup> However, where resources for GAD have been made available, they are often tied to development interventions themselves rather than also to supporting the staff to implement the catalytic role of GAD agencies, leaving some organisations with relatively large budgets but under-resourced staff means to use the budgets.

<sup>10</sup> For example, Lexow et al (1995), Taher (1993) and (1994) and an ad hoc collection of consultants' reports evaluating programmes and projects for different agencies.

<sup>11</sup> This comes out of my interest in planning methodology which I have been teaching at the DPU over the past 11 years.

<sup>12</sup> Hence, for example, the differences and overlaps between the analysis and strategies of socialist feminists and liberal feminists, black feminists and white feminists, Moslem feminist and feminist Islamic fundamentalists.

<sup>13</sup> This distinction is based on lecture and seminar work I have developed in the MSc in Urban Development Planning at the DPU. Based on this and for the purposes of this paper, while theory is defined as 'a set of general principle to explain a phenomenon', methodology is defined as 'a set of tools to investigate or undertake actions related to the phenomenon'. The inter-relation between them is clear and recognised.

<sup>14</sup> For example, challenging the use of the household as a unit in neo-classical economic theory and related methodology, and questioning the assumptions around the nuclear family and the distribution of resources between women and men which underlies much development policy and planning theory and methodology. Some of the implications include giving value to women's reproductive and productive activities, highlighting the problems with the concept 'head of household' and recognising the range of possible household structures,

recognising the unequal distribution of resources between women and men in most societies, and pointing to the importance of more equal participation of women in decision-making.

<sup>15</sup> Much initial work came from Latin America, not surprisingly, given the high proportion of urbanisation in that region relative to Africa and Asia.

<sup>16</sup> These include baseline studies, appraisal, monitoring and evaluation reports done primarily by international agencies, national governments or NGOs.

<sup>17</sup> At the time of writing, examples of new literature on the topic are IDS Bulletin (1995) and Jahan (1995).

<sup>18</sup> 'Gender Analysis' of the Harvard School is a tool linked to the project cycle and was taken on in this form by aid agencies like USAID. The focus on gender often reverted back to 'women' through the process.

<sup>19</sup> See Levy, C 'The Operational Components of Gender Policy and Planning', (forthcoming).

<sup>20</sup> Some examples are Evans (1991) and Taher (forthcoming) on research methods, Kabeer on monitoring (1989) and cost-benefit analysis (1992), Guijt (1996 and forthcoming) on participatory rapid appraisal.

<sup>21</sup> The term 'organisational landscape' is borrowed from the work of Michael Safier (1993), who uses it to describe the configuration of the public, private and community sectors in any particular context.

<sup>22</sup> Gender diagnosis is used here as a component of the gender policy and planning methodology - and as distinct from 'gender analysis', the approach associated with the Harvard School, which comprises a different set of components or techniques.

<sup>23</sup> For example, Hannan Andersson (1992), Jahan (1995), Goetz (1995).

<sup>24</sup> 'Community' is used here not as an undifferentiated unit, but with the recognition of the heterogeneity and diversity of communities on the basis of class, ethnicity, religion, age as well as gender.

<sup>25</sup> For example, the concepts which form the basis of 'gender analysis' as associated with the Harvard School, 'social relations analysis' as associated with IDS, and gender policy and planning as developed in the first instance by the DPU.

<sup>26</sup> While Molyneux (1985) talks about gender interests, Moser (1989) talks of gender needs.

<sup>27</sup> Generated through processes internal and/or external to women and men in communities and organisations.

<sup>28</sup> Constituency-based politics role is defined as political activities undertaken at community, local, national and/or sometimes international levels on behalf of interest-based constituencies at the political level, within the framework of traditional/customary structures, party politics and/or lobbying/campaigning groups (DPU Gender Policy and Planning team, Training materials for training in gender planning, 1992-93). Thus, while this term includes Moser's definition of 'community politics' (Moser, 1995), it encompasses political activities beyond the community level.

<sup>29</sup> For example, in Palestine some women's groups feel their interests are being compromised to pacify more extremist religious and political groups; in Eastern Europe social services which provided support for women in their reproductive roles and enabled them to participate in the productive and constituency-based politics roles, are being swept aside in the new political dispensation because they are being conflated with the communist era (see Molyneux, 1994).

<sup>30</sup> Usually Brazilians would be addressed in the masculine plural of the language. Specifically addressing them in the masculine and feminine plural is making a point about the visibility of women - even if one regards this cynically as vying for women's votes.

<sup>31</sup> While both these examples relate to public statements, political commitment can also be reflected in public acts and images.

<sup>32</sup> Over the last 6 months, Conservative Party spokespeople have led a concerted attack on single mothers as irresponsible and raising 'deviant' children, apparently in preparation for cutting budget allocations to them.

- <sup>33</sup> These chapters or plans often put together issues around not just women, but also children, the disabled and in some countries, ethnic minorities.
- <sup>34</sup> For example, Buvinic (1983), Molyneux (1985), Moser (1989) and (1993), Young (1993) and recent work on macroeconomic policy on the impacts of globalisation and structural adjustment, for example, Afshar (1992), Bakker (1994).
- <sup>35</sup> SIDA has under taken an intensive training strategy to training of staff in all Divisions including the strengthening of the catalytic skills of Gender Officers through a variety of mechanisms. The Gender Office also funds demonstration projects to illustrate the better performance which results from gender integration into development co-operation.(Hannan Andersson, 1992).
- <sup>36</sup> Guidelines for Transitional National Development Plan, 1992.
- <sup>37</sup> These were related to the commitment to create a balanced budget and to improve environmental deterioration (Ibid).
- <sup>38</sup> Members of the DPU Gender Policy and planning Team were involved in a training strategy to strengthen gender integration in the national planning process from 1992-1994.
- <sup>39</sup> For example SIDA, EU, UNIDO all have guidelines or reference manuals which highlight the integration of gender into terms of reference.
- <sup>40</sup> For example, the experience of the regular gender training programmes started in the mid 1980s started by ODA (1987) and SIDA (1988).
- <sup>41</sup> With men in top positions, women in lower positions in organisations; or with a majority of women or men in sex segregated activities. Although some believe that the situation with respect to the former is different in NGOs, evidence would suggest that this is a myth, as for example in Maia, M (1996).
- <sup>42</sup> See for example, Itzin and Newman (1995).
- <sup>43</sup> Bailyn and Rapoport, opcit.
- <sup>44</sup> See Levy, C 1992.
- <sup>45</sup> Logical Framework Analysis in a variety of forms has been widely introduced in international agencies, for example, GTZ, NORAD, ODA and the EU. Gender is either absent as an issue, or as in the case of the EU, is categorised as a social issue. There is ongoing work on the integration of gender into the various forms of logical framework analysis in GTZ and in the EU, including in the case of the latter, the contributions of the DPU Gender Policy and Planning team.
- <sup>46</sup> This highlights the usefulness of the distinction between community managing and constituency-based politics roles - and the relegation of women to community management roles so often.
- <sup>47</sup> Fernando (1985).
- <sup>48</sup> See Schon (1971) for a discussion of 'public learning'.
- <sup>49</sup> For example, gender aware PRA; key informants; representative committees to encourage 'ownership'.
- <sup>50</sup> Not just of the development discipline, but also the overlapping and crucial disciplines of economics, sociology, anthropology, and the applied disciplines like planning and policy analysis.
- <sup>51</sup> I have worked with students and colleagues in applying the web not just to the institutionalisation of gender, but also of the environment and of cultural awareness in policy and planning.
- <sup>52</sup> This approach has been used in organisations, dividing the web according to the structure and staff functions in the organisation. While bringing everyone together to put together the 'big picture', it also starts to focus the mind on possible entry strategies for change of those groups or individuals responsible for particular elements.

<sup>53</sup> See Levy, C (forthcoming).

<sup>54</sup> This process is described in more detail elsewhere, including a discussion of other the other key planning concepts in the gender policy and planning methodology (for example, working objectives, constraints and assets). See Levy, C (forthcoming) opcit.

<sup>55</sup> This process also highlights the false separation of diagnosis and action in any policy and planning endeavour.

## ANNEX 1

### INTRODUCTION TO A GENDER POLICY AND PLANNING METHODOLOGY

#### KEY QUESTIONS TO DIAGNOSE AND OPERATIONALISE THE INSTITUTIONALISATION OF GENDER

These are the key questions related to each element in the 'web' of institutionalisation (Levy, C, 1995) which are necessary:

- to assess the extent to which gender is currently institutionalised in the relevant parts of the organisation in which you work and partner organisations
- to guide the direction of future actions to reinforce and consolidate gender institutionalisation

Start with the elements in which you are most directly involved, remembering that

- for **diagnosis** purposes, it is useful to understand the situation with respect to gender in relation to each element
- for **operational** purposes, you can only directly affect change in relation to those elements within your sphere of responsibility

#### 'Delivery' of programmes and projects

This element focuses on the extent to which the process of programme or project formulation and implementation is gender aware.

- ⇒ Which are the groups from the public, private and community sectors involved in the process of formulation and implementation of the programme or project?
- ⇒ For each group, in which role are women and men involved in the formulation and implementation? to what extent is the formulation and implementation process sensitive to the demands of the other gender roles of the women and men involved?
- ⇒ To what extent are women and men's access to and control over the appropriate resources in performing their roles recognised in the process of programme or project formulation and implementation?
- ⇒ To what extent are the practical and strategic gender needs of women and men in each group recognised?
- ⇒ What is the underlying policy approach to the intervention?

#### Women and men's experience and interpretation of reality:

This element focuses on the impact of the programme or project on women and men in different groups in the community.

- ⇒ Which are the groups in the community affected by the intervention (assess each component separately as appropriate)?
- ⇒ For each group and taking account of their gender roles previous to the intervention, on which of the gender roles of women and men has the intervention had an impact, intentionally or unintentionally?
- ⇒ Taking into account their access and control over resources previous to the intervention, to what extent do women and men have access to and control over the appropriate resources to perform these roles?
- ⇒ Taking into account gender needs previous to the intervention, to what extent are the practical and strategic gender needs of women and men in each group met?

#### Pressure of political constituencies

This element focuses on the extent to which political constituencies representing different gender interests are involved in the formulation, implementation and evaluation of policies, programmes and projects.

- ⇒ Which political constituencies are involved in or would be appropriate to involve in the formulation, implementation and evaluation of policies, programmes and projects?
- ⇒ To what extent do these political constituencies represent different gender interests across class, age, ethnicity, religion (as appropriate)? are these reflected in practical or strategic gender interests?

### **Representative political structures:**

This element focuses on two issues: the extent to which the political structures involved in the formulation, implementation and evaluation of programmes and projects are representative of gender interests AND the extent to which the political structures involved in the formulation, implementation and evaluation of programmes and projects are representative in terms of the numbers of women and men.

- ⇒ Are there political structures directly or indirectly related to the intervention?
- ⇒ If yes, which are the groups involved in the political structures, and how many women and how many men are there in each group?
- ⇒ In terms of the participation of each group in the political structures, in addition to their constituency-based politics roles, to what extent has the intentional or unintentional impact on the other gender roles of women and men been allowed for (eg timing of meetings)?
- ⇒ In these different roles, to what extent do women and men have access to and control over the appropriate resources to participate in the structures?
- ⇒ To what extent are the practical and strategic gender needs of women and men met in these political structures?
- ⇒ Is there an underlying policy approach in the way in which some groups in the political structures are operating?

### **Political commitment**

This element focuses on the political commitment to integrate gender into the activities of your organisation and in partner organisations.

- ⇒ To what extent is there a political commitment in the organisations to integrate gender into development activities?
- ⇒ If there is, where does this commitment lie?
- ⇒ What is the underlying policy approach of this commitment (which gender roles, resources and gender needs are being explicitly or implicitly recognised)?

### **Resources**

This element focuses on financial resources in the budgets of your organisation and its partner organisations.

- ⇒ Is there a willingness to allocate current programme resources to gender issues in mainstream policies, programmes and projects?
- ⇒ Is there a willingness to allocate new resources to the integration of gender into development activities?



- ⇒ What proportion of resources are allocated to the different gender roles of women and men, to different resources for women and men, to practical and strategic gender needs of women and men?

## **Policy**

This element focuses on the policy framework(s) in your organisation and partner organisations.

- ⇒ What is the policy framework? to what extent has gender been integrated into existing policy? is there a specific WID/GAD policy?
- ⇒ On the basis of this policy framework, which gender roles, resources and gender needs are being recognised?

## **Procedures**

This element focuses on the extent to which current procedures associated with different stages of the programme cycle (eg terms of reference, financial proposals) in the appropriate organisations incorporate gender as an issue.

- ⇒ Which are the procedures associated with different stages of the programme cycle in the relevant organisations?
- ⇒ To what extent do they reflect a recognition of the different gender roles of women and men?
- ⇒ To what extent do they reflect a recognition of women and men's differential access to and control of resources?
- ⇒ To what extent do they reflect a recognition of the different gender needs of women and men?

## **Mainstream location of responsibility for gender issues**

This element focuses on the clarity of the location of responsibility for gender issues in your organisation and partner organisations.

- ⇒ Which are the groups responsible for gender issues?
- ⇒ For each group, to what extent are they acting in the appropriate roles, have adequate access to and control over resources, and have their gender needs met in a way that will enable them to carry out this responsibility appropriately?

## **Staff development**

This element focuses on the extent to which the working environment in which the actors involved in the formulation and implementation of policies, programmes and projects are operating, is supportive of its staff in a gender aware way (eg with respect to training; recruitment, promotion, ).

- ⇒ What are the mechanisms in place for staff development? Which groups are involved in the formulation and implementation of these mechanisms?
- ⇒ For the groups related to each mechanism, to what extent have the mechanisms given women and men equal opportunity in their productive roles? to what extent have the other gender roles of women and men been recognised?
- ⇒ To what extent do women and men have access to and control over the appropriate resources to perform these roles?
- ⇒ Where appropriate, to what extent are the practical and strategic gender needs of women and men being met through these mechanisms?

⇒ Where appropriate, is there an underlying policy approach in the way the mechanisms are being implemented?

### **Methodology**

This element focuses on the extent to which current methodologies applied in the formulation, implementation, monitoring and evaluation of policies, programmes, projects incorporate gender issues?

⇒ To what extent do they recognise gender roles, access to and control over resources, and gender needs of women and men?

⇒ To what extent are these factors linked to sectoral and macro-economic policy?

### **'Research'**

This element focuses on the extent to which gender is integrated into the 'applied research' (eg feasibility studies, evaluations) undertaken and/or secondary research used at different stages of the programme cycle.

⇒ To what extent do the relevant research initiatives and/or secondary research use methodologies and reflect knowledge on gender roles, access to and control over resources, and gender needs of women and men?

⇒ To what extent do the relevant research initiatives and /or secondary research reflect knowledge of the links between sectoral and macro-economic policy, and gender roles, resources and gender needs, as appropriate?

### **Theory-building**

This element focuses on the extent to which staff in your organisation and in partner organisations have access to information on gender and development debates.

⇒ What are the current sources of information on gender and development debates for the staff in the relevant parts of your organisation and those in partner organisations?

⇒ Currently in the organisation, which would be the most appropriate 'channels' for dissemination of such information?

*Source: Levy, C 'The Web of Institutionalization',  
Training in Gender Policy and Planning, 1995.*

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