

A Quick Guide to...

Gender Mainstreaming in Development Planning



Vivienne Taylor



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Commonwealth Secretariat

Gender Management System Series

Gender Management System Handbook

Using Gender-Sensitive Indicators: A Reference Manual for Governments and Other Stakeholders

Gender Mainstreaming in Development Planning: A Reference Manual for Governments and Other Stakeholders

Gender Mainstreaming in Finance: A Reference Manual for Governments and Other Stakeholders

Gender Mainstreaming in the Public Service: A Reference Manual for Governments and Other Stakeholders

Gender Mainstreaming in Education: A Reference Manual for Governments and Other Stakeholders

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A Quick Guide to the Gender Management System

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A Quick Guide to Gender Mainstreaming in Agriculture and Rural Development

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A Quick Guide to Gender and Equal Employment Opportunities

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Preface

In 1996, Commonwealth Ministers Responsible for Women's Affairs mandated the Commonwealth Secretariat to develop the concept of the Gender Management System (GMS), a comprehensive network of structures, mechanisms and processes for bringing a gender perspective to bear in the mainstream of all government policies, programmes and projects. The establishment and strengthening of gender management systems and of national women's machineries was the first of 15 government action points identified in the 1995 Commonwealth Plan of Action on Gender and Development.

This guide is intended to assist readers in using a GMS to mainstream gender in the development planning ministry of national governments. It is an abridged version of the GMS publication *Gender Mainstreaming in Development Planning: A Reference Manual for Governments and Other Stakeholders* presenting the main points of that document in an accessible way. It is hoped that both documents will be used by development planners and decision-makers, personnel managers, field staff and others.

These publications are part of the Gender Management System Series, which provides tools and sector-specific guidelines for gender mainstreaming. This guide is intended to be used in combination with other documents in the GMS Series, particularly the *Gender Management System Handbook*, which presents the conceptual and methodological framework of the GMS.

The development of the GMS Reference Manuals and Quick Guides has been a collaborative effort between the Commonwealth Secretariat's Gender and Youth Affairs Division and many individuals and groups. Their contributions are gratefully acknowledged. In particular, I would like to thank the following: all those member governments who supported the development of the GMS and encouraged us to move the project forward; participants at the first GMS meeting in Britain in February 1997 and at the GMS Workshop in Malta in April 1998, who provided invaluable conceptual input and feedback; and the Steering Committee on the Plan of Action (SCOPA). I am also

most grateful to: the various consultants who worked on the guide, including Vivienne Taylor, University of the Western Cape, South Africa, who wrote the text, and Daniel Woolford, Consultant Editor of the GMS Series, who revised and edited it for publication; and the staff of the Gender Affairs Department, Gender and Youth Affairs Division, Commonwealth Secretariat, particularly Ms Eleni Stamiris, former Director of the Division, who took the lead in formulating the GMS concept and mobilising the various stakeholders in its development, Dr Judith May-Parker who provided substantive editorial input, and Dr Rawwida Baksh-Soodeen, Project Co-ordinator of the GMS Series, who guided the project through to publication.

We hope that this resource series will be of genuine use to you in your efforts to mainstream gender.

Nancy Spence
Director
Gender and Youth Affairs Division
Commonwealth Secretariat

1

Introduction

Purpose and Scope of this Guide

This guide is intended for governments and other organisations that are seeking to advance gender equality and equity through the mainstreaming of gender in development planning. The Commonwealth is promoting gender mainstreaming by means of the Gender Management System (GMS), a comprehensive system of structures, process and mechanisms for advancing gender equality and equity, designed primarily for use by national governments in developing countries. This guide is intended for use in combination with other documents in the GMS series, especially the *Gender Management System Handbook* which provides a general introduction to the GMS and a guide for gender mainstreaming in national governments.

Gender mainstreaming is an approach to advancing gender equality that involves addressing gender inequalities in all aspects of development, across all sectors and programmes. Mainstreaming is not simply about ensuring that women's position is improved within existing frameworks which are dominated by men. Gender is mainstreamed when the development process and frameworks are transformed in ways which ensure the participation and empowerment of women as well as men in all aspects of life and especially in decision-making structures.

Changes in Approaches to Development Planning

The accelerated shift to market driven economies within a global system that determines terms of trade, foreign exchange controls and the boundaries within which local economies can develop has a significant impact on planning processes. An outcome of shifts in economic planning processes has been the appearance of new forms of exploitation, discrimination and domination – a result, many argue, of globalisation. While the imperatives of economic

growth have influenced terms of trade and foreign relations in most countries, women have raised their voices against economic growth models that have not included human development and women's development as a central element.

Governments recognise that current indicators of development in most regions reveal that women, who constitute more than 50 per cent of the population in most countries, remain the majority living in poverty (especially in rural areas), are victims of all types of violence, generally have lower literacy rates than men, and have experienced the least improvement in their quality of life. In some areas, male marginalisation, especially among young people, is also recognised as a significant problem of gender inequality.

But few concrete attempts have been made to address the root causes of gender injustice and the continued economic exploitation of women, even though women's paid and unpaid labour contributes significantly to the social economy and production processes. Governments' attempts to address gender inequalities have usually taken place in the context of an 'add on'¹ approach based on a particular understanding of women's position and of planning, rather than in the context of a critical analysis² of the political, social and institutional framework. Because of their inherent power imbalances, the dominant frameworks reinforce and promote existing gender hierarchies. Gender analysis and a gendered perspective are frequently missing in the development planning sector.

Comprehensive planning systems can take the form of long-range national development plans with a multi-sector approach through which countries attempt to promote accelerated economic growth and social development led usually by governments. They usually include an integrated public investment plan and a plan for the private sector. However, comprehensive planning systems with respect to government forecasts, estimates and private-sector interventions have tended to fall out of use because governments assume that market forces increasingly dictate the pace of growth and development in the private sector. Planning therefore tends to be partial in nature, with a focus limited to public investment plans and little attempt to complement these with a private sector plan. This has resulted in minimally regulated economic and social institutions and marginal state intervention in the market, with little benefit for those (usually women) who operate outside the formal markets.

Some economic planners have promoted the idea that minimal state intervention in economic and social planning is a necessary and desired condition for rapid economic growth. Many developing countries have moved away from traditional methods of development planning to an anti-cyclical planning process that is supply driven, technologically efficient and profit-oriented. This approach seeks to achieve the full use of a country's resources for social and economic progress through existing institutions and systems. The private sector is allowed to determine the direction and pace of growth, since this type of planning assumes that existing institutions operate at acceptable levels of efficiency. Anti-cyclical planning introduces minor changes to maintain existing levels of stability by using monetary and fiscal policies as instruments. This type of planning ignores the structural conditions and systemic crises in which most developing countries find themselves.

The anti-cyclical planning approach tends to have a negative impact on social development and gender relations, with increasing gender inequalities, joblessness for women and the 'feminisation of poverty'. So, while the rhetoric of planning remains, planning outcomes have failed to attain the type of growth that would promote sustainable human development.

Many Commonwealth governments are seeking to move away from the heritage of inefficient bureaucracies, inequities in social service delivery, and ever increasing gender disparities, and at the same time change technicist planning processes towards more participatory and engendered ones. For these and other reasons, development planning as a participatory process to promote integrated, holistic development which links economic, social and political goals is returning to the forefront in the search for a human development paradigm. Development planning is seen as a way of balancing the needs of people with the need for sustainable economic development.

Human Development

Development should be an integrated, holistic process that meets people's economic, social, political, cultural and environmental needs and improves the quality of life for all. This understanding of development includes the concept of human development, which

is measured not only according to economic indicators such as gross national product (GNP) but also according to health (life expectancy) and education (literacy and enrolment). This is the basis of the UNDP's Human Development Index, which ranks countries worldwide according to these three indicators. The importance of human development for women is the recognition that "if it is not engendered it is endangered" (UNDP, 1995). Human development cannot be equitable, sustainable or holistic unless it addresses gender inequalities and the needs of both women and men.

An important contribution to the advancement of gender equality has been the design of two new indices, the gender-related development index (GDI) and the gender empowerment measure (GEM). These indices are used to compare gender inequality in human capability (GDI) and inequalities in key areas of political and economic decision-making structures (GEM) (UNDP, 1995).

Gender Planning

While most current planning methods seek to promote economic growth, gender planning prioritises the conditions in which women live and work as a site for change. It involves a critical analysis of the gaps between women's and men's access to economic, social, political and cultural resources, which enables the development of policy initiatives to correct imbalances – including cases where men are not benefiting equally from the development planning approaches currently in use.

Traditional planning limits the type of interventions that could be made by planning authorities to address strategic gender concerns. In contrast, gender planning is socio-political and technical in nature, assumes conflict in the planning process, involves transformative processes, characterises planning as dialogue and critically examines the assumptions that a planning methodology can simply adopt a universally applicable set of technical procedures, and that the extent to which planners determine people's demands and prioritise needs reflects the situation on the ground.

Development and gender planning converge in respect of the goals of planning. It is logical to assume that, if women constitute the

poorest, are the most subordinate and are consistently denied access to the rights, services and benefits of society, then planning needs to be informed by a gender analysis which seeks to address the root causes of these gender-based inequalities. Gender planning should therefore not be seen as a separate, parallel process to mainstream development planning but should transform mainstream development planning to address the needs of women and poor people generally through an economically, socially and environmentally sustainable process.

Notes

- 1 'Add on' in this context means an incremental response to women's unequal position by creating new projects and including them in existing programmes without changing the existing programmes.
- 2 Gender analysis is the critical examination of a problem, issue or situation to understand the root causes of gender inequality or discrimination as it affects women and men in the development process.

2

Approaches to Development Planning and Gender Analysis

From Women in Development to Gender and Development

Efforts to promote gender equality have in recent years shifted in focus from 'women in development' (WID) to 'gender and development' (GAD). The 'women in development' approach began with an uncritical acceptance of existing social structures and focused on how women could be better integrated into existing development initiatives. Targeting women's productive work to the exclusion of their reproductive work, this approach was characterised by income-generating projects for women that failed to address the systemic causes of gender inequality. It also tended to view women as passive recipients of development assistance, rather than as active agents in transforming their own economic, social, political and cultural realities. A key outcome was that women's concerns were viewed in isolation, as separate issues, leading to their marginalisation in the state system and other structures.

The 'gender and development' approach, which forms the basis of the 1995 Commonwealth Plan of Action on Gender and Development, focuses more on the fact that women and men have different life courses and that development policies affect them differently. It seeks to address these differences by mainstreaming gender into development planning at all levels and in all sectors, focusing less on providing equal treatment for men and women (since equal treatment does not necessarily result in equal outcomes), and more on taking whatever steps are necessary to ensure equal outcomes. It recognises that improving the status of women cannot be understood as a separate, isolated issue and can only be achieved by taking into account the status of both women and men.

The 'gender and development approach' is built on an awareness not only of the differences between men and women but also of the inequalities that emanate from these differences. It seeks to address not only women's practical gender needs (the immediate

material needs of women in their existing roles as, for example, housewives and mothers) but also their strategic gender interests (the necessity of changing the position of women in society addressing inequities in employment, political participation and cultural and legal status).

Practical and Strategic Gender Needs

Because men and women have different roles and responsibilities, they also have different needs, identified as practical and strategic gender needs.

Practical gender needs emanate from the actual conditions people experience due to the gender roles ascribed to them by society. In the case of women, these needs are often related to women's roles as mothers, homemakers and providers of basic needs. Projects can meet the practical gender needs of both men and women without necessarily changing their relative position in society.

Strategic gender needs point to what is required to overcome the generally subordinate position of women to men in society and relate to women's empowerment. Such needs vary according to social, economic and political context. Most governments now acknowledge the need to create opportunities which enable women to address their strategic needs.

A twin approach is required which identifies the links between practical and strategic gender needs and proposes policy and planning frameworks to address both within institutions. Development responses that remain exclusively within the 'add-on' project approach tend to be inadequate to meeting strategic gender needs.

Women engage in multiple roles within the sphere of social reproduction and what is termed productive activity. These roles are categorised by Moser as follows:

- ◆ **the productive role:** this refers to market production and home/subsistence production undertaken by women which generates an income;
- ◆ **the reproductive role:** this refers to the childbearing and child rearing responsibilities borne by women – which are essential to the reproduction of the workforce; and

Table 1 Women's Triple Role and Meeting Practical/Strategic Gender Needs

Type of Intervention	Women's Role Recognised			Gender Need Met	
	Reproductive	Productive	Community Management	Practical	Strategic
1 Employment Policy					
(i) Skill training					
<i>Cooking</i>	♦			♦	
<i>Dressmaking</i>		♦		♦	
<i>Masonry/carpentry</i>		♦		♦	♦ ^a
(ii) Access to credit					
<i>Allocated to household</i>		♦		♦	
<i>Allocated to women</i>		♦		♦	♦ ^b
2 Human Settlement Policy					
(i) Zoning legislation					
<i>Separates residence and work</i>	♦				
<i>Does not separate residence and work</i>	♦	♦		♦	
(ii) House ownership					
<i>In man's name</i>	♦			♦	
<i>In woman's name</i>	♦	♦		♦	♦ ^c
3 Basic Services					
(i) Location of nursery					
<i>Located in community</i>	♦	♦	♦	♦	
<i>Mother's workplace</i>	♦	♦		♦	♦ ^d
<i>Father's workplace</i>	♦	♦		♦	
(ii) Transport services					
<i>Only peak-hour bus service</i>		♦	♦	♦	
<i>Adequate off-peak service</i>	♦	♦		♦	
(iii) Timing of rural extension meetings					
<i>In the morning</i>		♦		♦	
<i>In the afternoon/evening</i>	♦	♦	♦	♦	

- ◆ **the community management role:** this refers to activities undertaken by women to ensure the provision of resources at the community level, as an extension of their reproductive role (1993: 49).

To emphasise one against the other is to lose sight of the fact that women are carrying a heavy burden and that their actual working hours far outnumber those of men working in the productive sector.

Moser (1993: 49) proposes a way to link women's practical needs to strategic gender needs (see Table 1). She identifies types of intervention in three areas/sectors (employment, human settlement and basic services), the different roles women play, and whether in these examples the needs would be practical or strategic. Planners could use Table 1 to analyse whether government policy in key areas is responding to gender needs in the different spheres in which women live and work.

Table 1

Source: Moser (1993: 49)

- a Changing the gender division of labour.
- b Control over financial services.
- c Overcoming discrimination against women owning land, by law or tradition.
- d Sharing the burden of domestic labour between women and men

3

The State of Development Planning

This section examines the major issues in development planning, identifies some gender-related problems that can arise, and points to possible solutions by way of suggested action points that governments may wish to adapt to national circumstances.

Political Will and Adequate Financial and Other Resources

Some governments do not have an overarching policy or framework which could be used to guide the promotion of gender equality. Many others take a Women in Development approach which fails to address the root causes of gender inequalities. Where gender policies do exist, they are often hampered by a lack of political will and authority to guide their implementation. An explicit gender policy is required, providing guidelines on how government departments should institutionalise gender internally and respond to women's needs in society, such that planning agencies are obliged to implement, monitor and evaluate gendered development goals.

Advocate for political commitment at the highest levels

A strong political commitment to gender equality is demonstrated by the location of the Ministry of Women's Affairs, women's bureau or similar body in a high-profile, central sector of government, such as the Office of the Prime Minister or President, and by the availability of sufficient human and financial resources to mainstream gender across all sectors of government.

Promote participatory democracy and decentralise planning processes

From a gender perspective, participatory democracy can only result from the wide-ranging involvement of women in all spheres of public life and decision-making. Planning as a process should begin

at the local level with representatives of both civil society and government involved. However, for women's representation in local government structures to result in their informed and effective participation in these structures, a critical gender analysis of the roots of women's oppression and the strategic interventions that are possible through their participation is required. This can only result from gender awareness, training and organisational change.

Local government decision-making structures which have more women on them than ever before are a political advance, but will only produce results in development planning if the functions and powers of these structures are clarified and if devolving power to the local level does not mean devolving financial responsibility for the delivery of services and development projects without the necessary resource allocations. Decentralisation of development planning should include a restructuring of the system, devolving functions and powers from state/provincial governments and ensuring a sound resource base and resource allocations from central and state governments. Most importantly, it should lead to a planning process that promotes strategic gender goals from the bottom up through a co-ordinated system.

Development Planning and Macroeconomic Policy

Traditional methods of development planning tend to be based on efficiency and control and to be driven by a focus on growth. It is now accepted that economic growth on its own is not a sufficient condition for development (UNDP, 1995).

Many governments introduced development planning structures and systems as a means of ensuring that macroeconomic goals were attained. The development plan became the economic policy instrument to ensure a process of setting ceilings for public expenditure, allocations for public sector investment and incentives for private sector investments. Infrastructural development and services within the plan were driven by economic goals rather than the need to advance human development. In the process of attaining economic growth, the social development of people and particularly of women has often been neglected.

Set women's economic empowerment as part of macroeconomic goals

Women's integration into the economic system of developing countries is mainly at the lower end, because generally women and men are allotted different work roles. Women dominate in unpaid domestic work and subsistence food production while men dominate in waged employment and cash crop production. Women need to be afforded opportunities through education and training programmes, access to credit and land and other opportunities so that they can become equal participants in mainstream economic activity at all levels.

Women's position should also be considered as a critical part of the labour market when macroeconomic targets are set for economic growth. The manner in which capital intensive and technologically advanced industry affects labour mobility and conditions should be assessed from a gender perspective so that women do not become a cheap alternative within competitive markets. The economic and social wage (social security benefits, training, etc.) should be reviewed to ensure equity between male and female workers. The negative effects of globalisation on labour markets should be examined to prevent new forms of women's exploitation in the workplace and other economic activities.

Accord value to women's work

The general opinion is that it is difficult to place a value on the time women spend in social reproduction¹ and to translate this value into quantifiable data to measure their contribution to the economy. This should not prevent planners and statisticians from formally recognising and acknowledging the social value of women's work and its economic contribution. The way in which national accounting systems assess and monitor the value of women's work within the household, in the formal economy and at community levels, is critical. Until women's contribution to the economy is recognised and valued, allocations made to address women's positions will be seen as contributing to social consumption and not to growth and economic development.

Use appropriate sex-disaggregated data

Sex-disaggregated data and the building-up of an accurate database of gender indices of development is vital to effective planning.

This type of data is crucial to development planning, especially in ensuring that gender development indices are linked to gender empowerment measures.

Analyse the impact of economic structural adjustment programmes

Economic structural adjustment programmes (ESAPs) have contributed to increasing poverty among women and a social crisis in terms of health, education, social services and food security in many developing countries. This has led to a distrust of foreign intervention in domestic policy developments. The social costs of (ESAPs) need to be analysed and measures taken to reverse their negative impact.

A critical gender analysis of the root causes of social problems is essential

Gender roles, responsibilities and the gender division of labour are seldom analysed within the development planning process. Planners tend to assume that issues of poverty, race, ethnicity, class, and urban/rural disparities should be addressed before gender inequalities. This problem arises from a lack of analysis on the extent to which gender inequalities are embedded in other structural inequalities in society. Analyses of poverty and race/ethnicity should include a gender perspective.

Institutional Concerns

Planning tends to have a sectoral bias which results in a fragmented, compartmentalised approach and ignores cross-cutting gender needs and concerns. The problem is compounded when no single authority or agency takes responsibility for implementing the country's overall development programme. As a result, the failure to meet the needs of women in the various sectors is often not evaluated.

Integrate strategic gender needs through effective co-ordination of planning cycles

Development planning should ensure that there is a link between sectoral budgetary processes and goals and national budgetary processes so that gender objectives can be integrated throughout the process. The timing and sequencing of planning and implementation processes from the local to the national level is of

key importance to the coherence and achievement of development goals. It is not just a technical process but requires sensitivity to the need for democratic decision-making, as well as the recognition that bringing women and other marginalised interest groups into planning is essential but takes longer to achieve.

Establish structures and mechanisms to advance gender equality/equity

A difficulty within policy and decision-making structures is that promoting a gender perspective is generally the concern of a few committed individuals in a department or agency. These individuals often introduce a gender component to their projects and programmes without it being seen as a mainstream task within the entire department or agency. This is a barrier to the institutionalisation of gender. Departments and agencies need to ensure that gender policies are as much a cornerstone of planning as are macroeconomic policies and in fact should inform the macroeconomic policy framework.

Establishing effective national mechanisms for advancing gender equality and mainstreaming gender concerns into government planning requires a commitment from governments to undertake public service reform and to work in partnership with civil society organisations. Unless line departments/sectors establish structures and mechanisms to integrate gender into their policies, programmes and objectives, gender inequalities and women's needs are unlikely to be addressed, except in a welfarist, project-specific manner.

The establishment of national mechanisms such as an Office on the Status of Women within governments, or a National Council of Women, needs to go hand-in-hand with civil service reform. Government departments will need to review their staffing, programmes and impact to determine whether these create the space and leverage for advancing gender equality. The Commonwealth is promoting the Gender Management System as a means of creating and maintaining the institutional arrangements required for effective gender mainstreaming.

Independent constitutionally created organs such as a Commission on Gender Equality will need to monitor the public, private and civil society sectors to ensure that gender equality is promoted. Monitoring all sectors requires the development of effective partnerships with key organisations.

Recruit women as well as men into the planning field

Most departments and agencies have staff with knowledge and expertise related to their sector but without a gender-aware perspective. In development planning agencies most staff are usually male, and training is orientated to technical and administrative aspects of work and fits the traditional planning mode. There is a shortage of professional women in the planning sector who have a gender analysis capability. Planning agencies and departments need to analyse the roles, rights and responsibilities of women and men in government, and to prevent women's exclusion from development planning.

Introduce gender policy/planning training into planning agencies

Gender inequality is shaped by a specific set of circumstances and derives from particular historical and social contexts and emerges in different forms at different periods. Planning must be located within its own social, economic and historical context to be relevant. Training is required to raise awareness of these contexts.

Ensure that systems of governance and planning are accountable, transparent and accessible

Discussions with policy-makers and technical planners in some Commonwealth countries reflect the need for development planning to be accountable, transparent and accessible. Accountability can be effected within and outside of government. In addition, ways must be found to promote partnerships with civil society to address development needs, particularly of marginalised groups.

Promote participant involvement in monitoring and evaluation

Evaluation is usually measured in terms of output, such as in relation to numbers of people who have been served through budget allocations. The effect of programmes and the impact they have had on the extent of the problem of gender inequality is seldom evaluated. Projects and programmes will only become culturally relevant and appropriate if the people targeted are a part of the planning process, and inform programme planners about what is culturally acceptable, gender-sensitive and likely to succeed. Poor women's perspectives need to be included in the conceptualisation of plans, as well as their monitoring and evaluation.

Public and Private Spheres

Where an attempt is made to improve the position of women, this is usually in the public sphere and does not necessarily result in changes in gender relations within the home. Power relations in the private sphere are among a number of factors contributing to women's failure to make effective use of changes in the public sphere to advance gender equality. It is important to create conditions which ensure that the spaces opening up for women to participate more actively at higher levels of decision-making are matched by men taking on more of the work at the household/family and community levels. This can be facilitated through gender-aware primary, secondary, tertiary and continuing education curricula and processes.

Notes

- 1 Social reproduction means all the tasks women generally carry out in the care of children, the elderly, within the household and in the community and for which they are usually not paid.

4

Mainstreaming Gender in Planning Cycles

Attempts to mainstream gender into the planning sector should be located within country-specific political and administrative contexts. Gender policy should be integrated into organisational planning instruments such as budget lines, project criteria, operational tools, and day-to-day practice and procedures. The belief system and culture of the organisation will only change if policy is translated into democratic decision-making and a gender-supportive work environment.

The leadership, culture and style of an organisation should support gender equality. If the leadership and management style discriminates against one gender or is insensitive to gender relations then implementation of policies and projects to address gender inequities will be hindered. The extent to which managers are able to change their own style and the culture of their organisations will depend on the success of gender training and a performance appraisal system that rewards gender awareness and the attainment of gender-related goals.

Gender-Aware Policy and Planning

Although women's contribution to social reproduction and unpaid work is a major contribution to national economies, they continue to have low status and limited opportunities to become part of or gain benefits from economic and political systems except at the lower ends. Gender-aware policy and planning are important tools to effect a positive change in women's conditions. They are more likely to respond to deep-seated patterns of discrimination against women when women themselves collectively analyse and contribute to policy-making and planning processes. In cases where men are not benefiting equally from development planning strategies, a gender-aware approach also enables interventions to correct these imbalances.

The absence of a clearly established gender policy is a major problem in development planning. The following paragraphs show how gender can be integrated into the major policy and planning cycles of government.

The Four Major Planning Cycles

There are usually four major planning cycles through which most developing countries seek to respond to national needs and issues. These are: the macro/sectoral policy cycle, the budget cycle, the aid cycle and the project cycles (see Figure 1). These cycles when brought together through a planning process usually reflect a government's medium-term (5-10 year period) expenditure plan, as in Figure 2. The inclusion of a gender perspective throughout all four planning cycles (Figure 1) and in the different stages of each will strengthen the possibility of change from gender-blind to gender-aware policies, plans and programmes within institutions and will act as an internal guide for changes in the macro process illustrated in Figure 2.

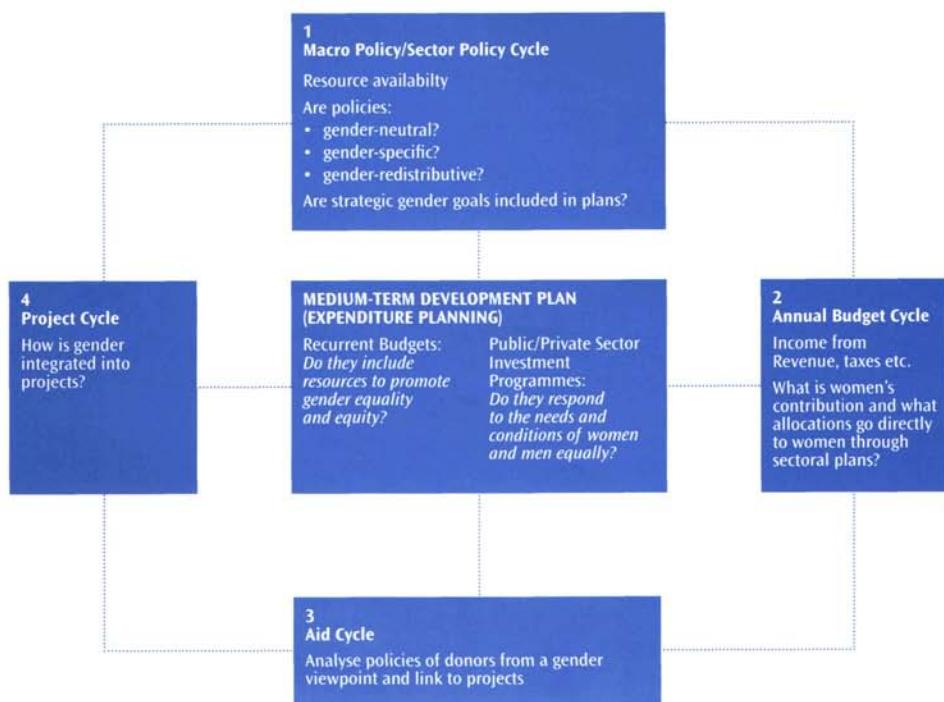
The macro and sector policy cycles and the medium-term development plan

In establishing macro policy frameworks, gender analysis and outputs need to be included to ensure effective policies which address the needs of all sectors of the population. Approaches to policy-making which influence gender outcomes can be categorised into three types: gender-neutral, gender-specific and gender-aware/redistributive or transformative (Kabeer, 1994: 80-97).

- ◆ **Gender-neutral policies** are those that are seen as having no significant gender dimension. However, government policies seldom if ever have the same effect on women as they do on men, even if at first sight they may appear to exist in a context where gender is irrelevant. In order to determine that a policy is genuinely gender-neutral, it is necessary to have complete and accurate information about the gender-based division of resources and responsibilities relating to the policy. Otherwise, policies which may appear to be gender-neutral may in fact be gender-blind, and biased in favour of males because they presuppose that those involved in and affected by the policy are males, with male needs and interests. *Example:* a policy to extend credit to small enterprises which does not address the constraints women face in obtaining such credit.
- ◆ **Gender-specific policies** take into account gender differentials, and target women or men specifically, but leave the current distribution of resources and responsibilities intact. *Example:* a micro-credit scheme that targets women.
- ◆ **Gender-aware/redistributive/transformative policies:** These are aimed at transforming existing gender relations to achieve

Figure 1

The Four Planning Cycles and the Medium-Term Development Plan



democracy by redistributing the division of resources, responsibilities and power between women and men more evenly. This policy approach is politically challenging since it seeks to redirect resources to women and requires men to give up certain privileges while taking on responsibilities which result in equity in development outcomes. But they also go the furthest towards addressing not only practical gender needs but also strategic gender interests (adapted from Kabeer, 1994).

Gender planning places particular attention on the unequal relations between men and women in development, and on how to address the needs of women. In the broader process of development planning it means that gender issues are recognised in the identification of the problems or needs, incorporated into the development goals and objectives and gender-aware policies, right through to implementation.

Generally policy and programme interventions could fall within a welfare, equity or transformation/empowerment approach. A welfare approach usually responds to meeting the practical needs of women, whereas a transformative approach responds to meeting strategic needs.

A participatory process

The potential of gender policy to transform gender relations and the gender-biased distribution of resources is greatly enhanced if that policy is developed through a participatory process involving key decision-makers within the department concerned and in other related sectors, as well as with the groups and communities the policy is intended to benefit. A gender policy formulated through such a participatory process is far more likely to gain wide-ranging acceptance, and sufficient commitment to its implementation for the attainment of its goals.

Gender policies and planning must ensure that poor women do not become a target for experiments or the dumping ground for technically conceived plans that do not respond to their specific needs. Experience has shown that when such experiments or plans do not produce the desired result, planners and donors tend to perceive the problem to be the apathy of poor women rather than ill-conceived project designs that have not involved such women from the beginning.

Policy planning that is engendered should ensure the following:

- ◆ clear goals and guidelines related to gender and development;
- ◆ consistency with the organisational goal of transformation of gender relations and employment equity;
- ◆ consultation at all levels and collective ownership of policy goals;
- ◆ baseline sex-disaggregated information;
- ◆ clearly outlined regional and national co-ordination functions and communication channels;
- ◆ gender-specific evaluation and monitoring criteria; and
- ◆ external evaluation at and between different levels of performance.

The medium-term development plan

Figure 2 shows the main stages in the preparation of a gender-aware medium-term development plan. It shows how the 'engendered' inputs from the macro and sectoral policy planning cycles can be

Figure 2

Main Stages in Preparing a Gender-Aware Medium-Term Development Plan (MTDP)

- 1 Approval by Cabinet of initial approach and timetable for Development Planning Process. The need for promoting gender equality through the MTDP should be explicitly stated.
- 2 Preparation of initial macro framework: Using available sex-disaggregated data to assess recent performance and current status of the economy and social development in the country, prospects for the medium and longer term, and their implications for Government expenditure targets. This is viewed against social needs and pressure points that could cause political and economic turbulence. Gender status and analysis is critical in this framework, which should be developed in close consultation with NGOs, other civil society partners and the private sector.
- 3 Macro Issues Paper to be considered by Cabinet: A short paper to:
 - ◆ brief Cabinet (and senior officials) on the economic and social situation, and the comparative position of women and men;
 - ◆ present alternative scenarios for the country's economic performance over the MTDP, with corresponding scenarios for public expenditure to address gender inequality;
 - ◆ identify main macroeconomic and sector policy issues that the next MTDP needs to address. Mainstream strategic gender interests into these or prepare a paper on Gender and the Macro Framework.

Cabinet reactions to the macro issues paper are reflected in drafting gender-sensitive guidelines for sector papers.

- 4 Sector Issues Papers to be considered by Cabinet: To be prepared by the sector concerned including women's/gender sector. Papers should be very short, alerting Cabinet to the main sector issues and impact on gender relations and gender inequalities and the important trade-offs that must be considered.
- 5 Detailed Macro Framework Paper with expenditure guidelines: In the light of reactions to the initial macro paper and to the sector issues' papers, Cabinet is presented with a detailed macroeconomic and development paper which proposes overall economic and public expenditure projections for the MTDP period and also proposes a sectoral allocation of resources to serve as the framework for drafting of sectoral chapters and expenditure proposals for the MTDP. This paper should include a gender focus – addressing inequalities and promoting gendered planning in respect of resource allocations.
- 6 Preparation of draft chapters, expenditure proposals and proposed projects: Drafts to be prepared initially by the sector ministries. Development planning departments/agencies should assess objectives in terms of mainstreaming gender into all plans, policies and outcomes and refer back to sectors if gender analysis is missing.

- 7 Review of draft chapters, preparation of consolidated expenditure programmes: Co-ordination between central resource agencies (Planning, Finance, Personnel) in reviewing sector proposals and preparing consolidated expenditure programme. Expenditure programme and review process to be co-ordinated with annual budget preparation. Ensure that tools are built in at this stage to monitor and evaluate the impact of the programmes in promoting gender equality and equity.
- 8 Approval of full draft by Cabinet: Overall editing by planning agency and submission of full draft to Cabinet for final approval. Prioritise gender, class, race/ethnicity as criteria to assess relevance of proposals. Cabinet to have a set of guidelines to measure proposals within criteria.
- 9 Presentation to Parliament: MTDP submitted to Parliament for full debate and approval. Parliament to understand the criteria (gender, race/ethnicity, income inequalities) and guidelines used to approve policy/plan.

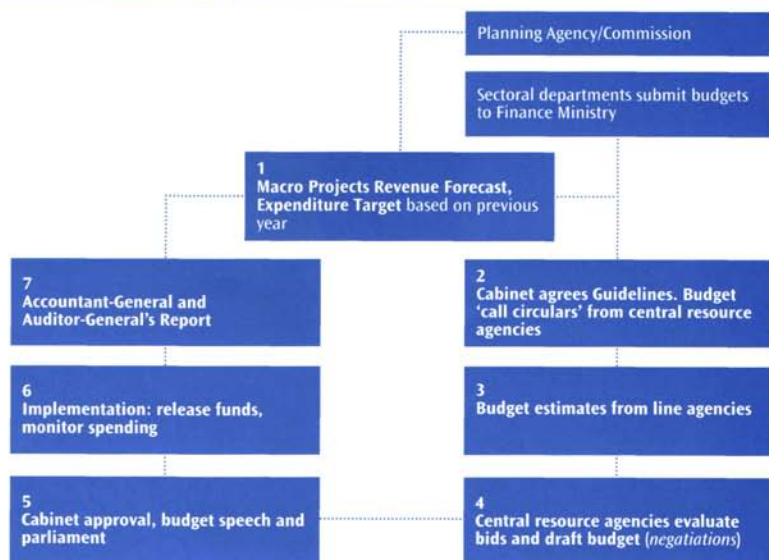
combined to produce a medium-term plan of expenditure which then informs the preparation of annual budget expenditures. These then feed into the project cycles in the various sectors.

The annual budget cycle

The general procedure in countries is one in which different government departments draw up their sectoral budget requirements in a 'year-on-year' basis and then go through a process of lobbying and negotiating with their Finance Ministries to secure the funds to implement departmental programmes. Most departments work hard to justify existing expenditure patterns and projections for the next year since they have a vested interest in these and do not introduce major changes or new priority areas. Links need to be strengthened between the goal of planned change with regard to gender inequalities and decisions made on annual public allocations to departments.

The annual budget cycle needs to be engendered because the budget is the key policy instrument through which resources are allocated to departments to promote development. Annual budget cycles should include criteria to measure how the budget responds to race, gender, caste/class and other disparities, and should be drawn up as the end result of a process of negotiations representing all interests. Clearly, budget outcomes and allocations, especially related to the promotion of equality, should be an indication of women's interests and needs.

Figure 3 The Annual Budget Cycle



Source: Taylor (1996)

'Gendered' allocations should be determined through a consultative procedure led by gender-aware officers. Parliamentary or political lobbying can influence government's responsiveness to such a process. The sectoral departments and Finance Ministries should negotiate budget priorities with reference to the government planning agency. In countries where there are planning commissions or units, these agencies have the potential to play a key role in ensuring budgetary allocations towards gender equity. Some countries have developed a Women's Budget to raise gender awareness within the budget process and identify the manner in which women's needs and interests are 'missing' in the National Budget.

Figure 3 shows the basic stages of the annual budget cycle. Concrete steps towards engendering each stage of the process are as follows:

- ◆ **Stage 1** is an outcome of the macro policy process in Figure 2. These projections and targets should include a gender analysis showing how practical and strategic gender needs are addressed.
- ◆ **Stage 2:** Ceilings should be set within which programmes targeting women or gender are reflected. Such programmes should not be 'added on' through donor aid and grants only but become a part of departments' normal work.

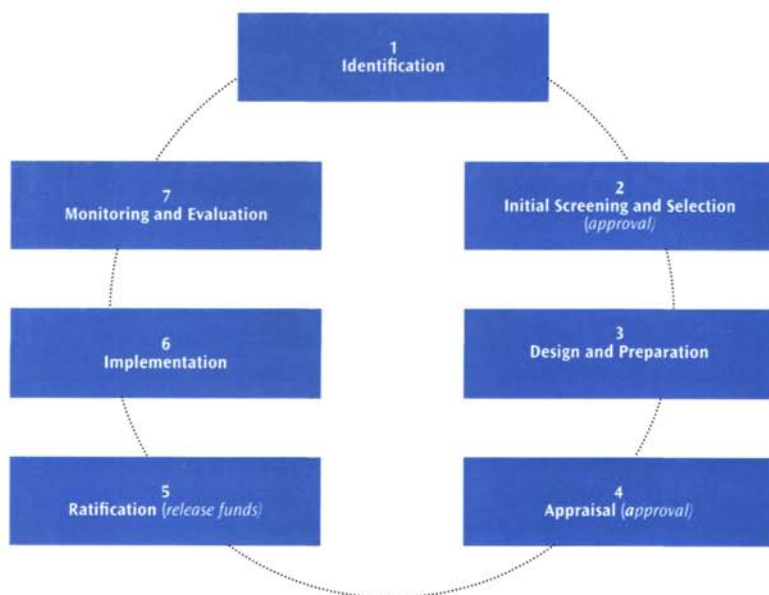
- ◆ **Stage 3:** Estimates for departmental programmes should be drawn up with a gender perspective.
- ◆ **Stage 4:** Budgets should be evaluated in terms of meeting both overall budget/debt targets and gender objectives.
- ◆ **Stage 5:** The budget speech should reflect line departments' gender priorities.
- ◆ **Stage 6** has been found to be one of the major obstacles to effective planning. Efforts should be made to decrease the time lapse between Cabinet approval [5] of sectoral budgets and release of funds [6].
- ◆ **Stage 7:** Accounting systems leading to this stage should be thorough and gender-aware. Government systems should be designed to ensure a reallocation of resources and a monitoring of the use of expenses. At this stage an analysis is made of the use of government money within global allocations.

The aid cycle

Development goals and planning priorities are usually determined through a political process and negotiated on the basis of many factors which do not always include the needs or concerns of the majority of people and often excludes women. One of these factors is that plan implementation depends not only on national budget priorities and allocations but also on donor aid.

A critical aspect of the complex relationship between donor organisations and the government and non-governmental sectors is the type of bilateral agreement made between governments and international agencies, which can lead to donors prescribing inappropriate policy and development directions. Governments' capacity to utilise donor aid in accordance with the implementation and delivery schedule is also limited. This results in a lag in the delivery of services on the ground.

A further complication is that donors, be they inter-governmental organisations, bilateral governmental agencies or non-governmental organisations, have their own development agendas, reflect their own interests and have conditions that often do not converge with the recipient country's priorities. The political aspects of development aid and countries' dependency on aid in the form of finance, knowledge and technology need to be examined in terms of their impact on the material and cultural aspects of women's and men's lives.

Figure 4 **The Project Cycle**

Source: Taylor (1996)

The project cycle

The project cycle describes the process whereby projects are chosen, designed, implemented and evaluated as a technical process, as shown in Figure 4.

Mainstreaming gender at the project level has the limitation that while projects may address specific practical gender needs of women, they are unlikely to address the broader strategic gender interests which will ensure the transformation of unequal gender relations in society.

The project cycle may be engendered using the checklist of current interventions indicated in Table 2 to respond to practical gender needs. These interventions are more likely to facilitate systemic change if clear linkages are established between organisations and departments and within and outside of government to promote gender planning across sectors and interests.

Table 2 Checklist of Interventions to 'Engender' the Project Cycle

	Stage	Important Interventions
1	Identification	<ul style="list-style-type: none"> ◆ policy direction ◆ targeted or mainstream intervention
2	Initial Screening and Selection (a) definition of target group (b) identification of gender objectives	<ul style="list-style-type: none"> ◆ gender diagnosis ◆ gender roles identification ◆ gender needs assessment
3	Design and Preparation (a) personnel (b) socioeconomic feasibility studies	<ul style="list-style-type: none"> ◆ staff gender training ◆ gendered terms of reference for staff consultants ◆ mechanisms to ensure women and gender-aware organisations are included in planning process ◆ gender needs assessment ◆ gender-disaggregated data on allocation and control of resources
4	Appraisal (a) mission personnel (b) appraisal studies	<ul style="list-style-type: none"> ◆ gendered terms of reference for consultants ◆ inclusion of gender expert ◆ staff gender training ◆ gendered cost-benefit analysis to include women's 'invisible work' i.e., the unpaid work they do as part of their reproductive role ◆ inclusion of women in staff gender training
5	Ratification	<ul style="list-style-type: none"> ◆ entry point for gender dialogue ◆ staff gender-awareness training
6	Implementation (a) agency and staff (b) target population	<ul style="list-style-type: none"> ◆ staff gender planning training ◆ gendered terms of reference for staff ◆ gendered composition of agency ◆ clarification of women's role in participatory projects
7	Monitoring/Evaluation	<ul style="list-style-type: none"> ◆ gendered terms of reference for consultants ◆ staff gender training ◆ team composition

Source: Moser (1993: 157), based on Antrobus's guidelines (1989: 13-16)

4

Tools for Gender Mainstreaming in Development Planning

Using Gender-Sensitive Indicators

Access to relevant sex-disaggregated data is a key element in mainstreaming gender in development planning. The GMS series of publications includes a guide to the use of gender-sensitive indicators, which may be of use in this regard (see Beck, 1999).

“An indicator is an item of data that summarises a large amount of information in a single figure, in such a way as to give an indication of change over time, and in comparison to a norm. Indicators differ from statistics in that, rather than merely presenting facts, indicators involve comparison to a norm in their interpretation. A gender-sensitive indicator can be defined as an indicator that captures gender-related changes in society over time.”

Beck, 1999

Thus an example of a *gender statistic* would be: “60% of women in country X are literate”. An example of a *gender-sensitive indicator* would be: “60% of women in country X are literate, as compared to 82% of men, and compared to 30% and 52% five years ago” (Beck, 1999).

Gender-sensitive indicators are potentially very useful in mainstreaming gender in development planning. However, there are limitations on the amount and type of information they can provide. Care needs to be taken in their interpretation.

“The greatest limitation of gender-sensitive indicators is that they do not provide information on wider social patterns: they will usually tell the analyst little about why gender relations have been shaped in a particular way and how these relations can be changed. They point to key questions rather than providing answers. Indicator systems should therefore be complemented by gender analysis, which involves examining, often at a micro-level, the social relations between women and men, and the structural features of society which reinforce gender inequality.”

Beck, 1999

Table 3 Gender and Macroeconomics

Indicator	Indicator Questions
1 Private consumption expenditure of households	<ul style="list-style-type: none"> ◆ How much of the household's expenditure is directed towards the purchase of food, education and health related matters?
2 Total government expenditure and as percentage of GDP	<ul style="list-style-type: none"> ◆ Who controls the household budget, and what say do women have in expenditure? ◆ How far is government expenditure directed towards promoting gender equality and equity?
3 Breakdown of government expenditure by sector	<ul style="list-style-type: none"> ◆ Do women and men have an equal role in national level budgetary planning? ◆ What percentage of total government expenditure is allocated to health and education?
4 Proportion of persons and households at risk covered by social security and similar schemes	<ul style="list-style-type: none"> ◆ Have health and education suffered budget cuts under structural adjustment programmes? How have such cuts affected efforts to advance gender equality and equity?
5 Proportion of potentially eligible persons and households receiving social insurance, social assistance and similar benefits	<ul style="list-style-type: none"> ◆ Are women and men equally covered by social security and other schemes? Are such schemes sufficiently gender-sensitive? Is sufficient attention being paid during national level budgetary planning to groups at risk, such as poor single mothers and female heads of households?

Source: Beck (1999)

Table 3 shows some basic macroeconomic indicators, along with pertinent gender-related questions, which could be useful in providing a gender perspective on macroeconomic policies and plans.

Tools for Gender Integration into Macroeconomic Policy

The policy options developed by the Commonwealth Secretariat for integrating gender into national budgetary policies¹ centre on six possible tools:

- ◆ **sex-disaggregated beneficiary assessments** – a research technique whereby groups of women are asked how, if they were the Finance Minister, they would slice the national budgetary pie; the results are compared with the existing budget to see how closely it reflects women's priorities.

- ◆ **sex-disaggregated public expenditure incidence analysis** – this involves analysing public expenditures in such areas as health, education and agriculture to see how such expenditures benefit women and men, girls and boys to differing degrees.
- ◆ **gender-aware policy evaluation of public expenditure** – evaluating the policy assumptions that underlie budgetary appropriations, to identify their likely impact on current patterns and degrees of gender differences.
- ◆ **gender-aware budget statement** – a modification of the Women’s Budget; this is a statement from each sectoral ministry or line department on the gender implications of the budget within that sector.
- ◆ **sex-disaggregated analysis of the impact of the budget on time-use** – this looks at the relationship between the national budget and the way time is used in households, so as to reveal the macroeconomic implications of unpaid work such as caring for the family, the sick and community members, collecting fuel and water, cooking, cleaning, teaching children and so on.
- ◆ **gender-aware medium-term economic policy framework** – medium-term macroeconomic policy frameworks are currently formulated using a variety of economy-wide models which are gender-blind. Approaches for integrating gender could include: disaggregating variables by gender where applicable; introducing new variables incorporating a gender perspective; constructing new models that incorporate both national income accounts and household income accounts reflecting unpaid work; and changing underlying assumptions about the social and institutional set-up for economic planning.

Notes

- 1 The policy options are described in greater detail in the GMS publication *Gender Mainstreaming in Finance: A Reference Manual for Governments and Other Stakeholders* (Sen, 1999).

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Appendix Glossary of terms

Development

Development as a concept and process is defined in many ways depending on who uses it and for what purpose. In this guide, development is understood as economic and social activities the basic objective of which is to enlarge people's choices by providing equality of opportunity for all people in society, sustaining such opportunities from one generation to the next and empowering people so that they participate in and benefit from development processes (UNDP, 1995: 1). This definition means that development is not only measured according to economic indicators such as gross national product but also according to health (life expectancy) and education (literacy and enrolment).

Development planning

"Planning can be defined as a conscious effort on the part of any government to follow a definite pattern of economical development in order to promote rapid and fundamental change in the economy and society" (Waterston, 1982: 23). Development planning is the process through which economic development is planned. Many countries, irrespective of their political ideology, use the process of development planning to achieve national goals.

Gender

Gender is a term used to refer to the socially constructed characteristics that define and relate to male and female ways of being and behaviour within specific contexts. Gender also refers to the web of cultural symbols, normative concepts, institutional structures and internalised self-images which, through a process of social construction, define masculine and feminine roles and articulate these roles within power relationships.

Gender diagnosis

Gender diagnosis refers to the gender analysis of various indicators, including economic status, employment/unemployment patterns,

participation in decision-making, and health, education and other sectoral indicators to determine the specific nature of the gender situation in a given country/society/organisation, so that appropriate remedial interventions can be designed.

Gender division of labour

The term 'gender division of labour' refers to the fact that generally women and men are allotted different work roles. These work roles deeply discriminate since women tend to be confined to menial, low-skilled, low status and poorly paid jobs while men usually have jobs with higher status and pay. Also women dominate in unpaid domestic work and subsistence food production and men dominate in waged employment and cash crop production.

Gender needs assessment

The final stage of gender diagnosis (see above), this entails identifying what the specific practical and strategic needs are of women and men in a given society.

Gender-neutral policies

These policies are seen as having no significant gender dimension. However, government policies seldom if ever have the same effect on women as they do on men, even if at first sight they may appear to exist in a context where gender is irrelevant. In order to determine that a policy is genuinely gender-neutral, it is necessary to have complete and accurate information about the gender-based division of resources and responsibilities relating to the policy. Otherwise, policies which may be gender-neutral may in fact be gender-blind and biased in favour of males because they presuppose that those involved in and affected by the policy are males with male needs and interests.

Gender planning

"Gender planning can be defined as that approach to development planning which is based on an explicit recognition of the unequal relations between men and women in society, which are justified by symbolical codes" (Wieringa, 1994: 51). This definition is based on the premise that societal structures and the symbolic codes

which emanate from cultural patterns, laws, processes and procedures reinforce and perpetuate gender inequalities.

Gender planning, as an approach, recognises unequal relations between men and women but intervenes to change these patterns and symbolic codes. It seeks to address unequal gender relations which result in a skewed sexual division of labour, unequal access of women to basic resources, limited political representation of women in decision-making, a tacit acceptance of male violence against women and the continued subordination of women.

Gender-aware/redistributive/transformational policies

These are aimed at transforming existing gender relations to achieve democracy by redistributing the division of resources, responsibilities and power between women and men more evenly. This policy approach is politically challenging since it seeks to redirect resources to women and requires men to give up certain privileges while taking on responsibilities which result in equity in development outcomes. But they also go furthest towards addressing not only practical gender needs but also strategic gender interests.

Gender roles identification

The identification of the respective roles played by women and men in the productive, reproductive and community management spheres. It forms an integral part of gender diagnosis (see above).

Gender-specific policies

A policy that is gender-specific takes into account gender differentials, and targets women or men specifically, but leaves the current distribution of resources and responsibilities intact.

Incremental planning

The process of making slight adjustments to an existing framework without major changes to its goals or priorities.

Partial planning

This entails planning for part of the economy, usually the government's investment plan, with the setting of estimates and goals.

Sex-disaggregated data

This is data collected – via questionnaires, observation or other techniques – that reveal the different roles and responsibilities of men and women. Having data disaggregated by sex is extremely important to being able to assess the impact of a project on women separately from its impact on men.

Strategic planning

The process of linking needs and conditions in the policy in the policy environment to strategic choices within organisations.

A Quick Guide to...

Gender Mainstreaming in Development Planning

Gender mainstreaming is the current international approach to promoting equality between women and men.

It is based on the recognition that gender inequality operates at all levels and in all sectors of society, and thus needs to be addressed in the mainstream. It aims to ensure that women and men benefit equitably from all that society has to offer, and are equally empowered to affect its governance and decisions.

The Gender Management System (GMS) is a holistic and system-wide approach to gender mainstreaming developed by the Commonwealth, for the use of governments in partnership with other stakeholders including civil society and the private sector. The GMS is a comprehensive network of structures, mechanisms and processes to enable governments and other organisations to contribute to gender equality through all policy-making, planning and activities.

This Quick Guide has been produced to assist governments and other stakeholders in mainstreaming gender in development planning. It is an abridged version of the GMS publication *Gender Mainstreaming in Development Planning: A Reference Manual for Governments and Other Stakeholders*.

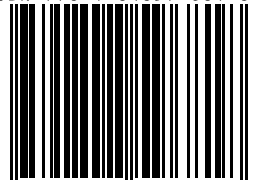
Other topics covered by publications in the GMS Series include:

- The Gender Management System
- Using gender-sensitive indicators
- Finance
- The public service
- Education
- Trade and industry
- Agriculture and rural development
- Information and communications
- Equal employment opportunities policy



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