**CARE Canada**

**Gender Equality Organizational Capacity**

**Rapid Checklist and Progress Measurement Tool**

CARE increasingly partners with government bodies, community based organizations, or private businesses. One of the goals of working with these groups is to ensure that they have the capacity to address gender issues relevant to their organizational goals.

The tool described in this guidance note is meant to assist with a rapid scan and assessment of the organizational competencies, policies, systems and attitudes of CARE’s partners with a focus on gender dynamics at the organizational level. The tool is not meant to replace a full gender audit or a gender-sensitive organizational capacity assessment. It is meant to

* stimulate dialogue between CARE and its partners regarding the organization-level gender equality systems, processes, skills and attitudes necessary to bring about sustainable project results;
* measure the extent to which CARE’s partners adhere to the basic conditions of a gender-sensitive organization; and
* measure the results of CARE’s efforts to strengthen partners’ capacity in this area.

This guidance note is broken into three parts.

1. A basic description of the tool and its goal.
2. A template of the tool itself, ready to be printed, photocopied and used by staff after modifications for local and project context.
3. A step-by-step explanation of how to use the tool and analyse the findings that it will provide.

For further information on gender equality organizational capacity development and assessment, gender audits and partner capacity building, please refer to the organizational development section on the [**CARE Gender Toolkit**](http://pqdl.care.org/gendertoolkit/Pages/organizational%20view.aspx).

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| --- | --- |
| **Tool 4:** | Gender Equality Organisational Capacity Checklist |
| **What does this tool measure?** | **What is the goal of using this tool?** |
| This tool measures the extent to which organizations have key gender equality tools, systems and processes in place.  | The goal of using this tool is to determine if the organization has the systems and structures necessary to ensure sustainable gender equality results in its work. It can be used as the backbone of a gender audit or gender equality partnership assessment.  |

**Tool 4: Enumerator’s Checklist**

*(instructions in italics)*

**Name of Interviewee:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Position in Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Ask the interviewee each question below. Tick the appropriate box. Probe and make notes underneath the chart based on the conversation.*

| **Organizational Gender Equality Assets** | **Yes** | **No** |
| --- | --- | --- |
| **Organizational Culture** |
| Does the organization have a gender strategy or gender equality goals in its strategic planning document?  |  |  |
| Do annual reports, general publications and promotional material discuss gender issues and the organization’s gender equality programming?  |  |  |
| Is the physical space in the organization friendly for both female and male employees? (Separate washrooms for men and women in good order; female staff has the same calibre of technology as male staff; female and male staff have equal access to cars and drivers; etc.)  |  |  |
| Does the organization have a reputation of addressing gender equality as part of its work (check with local women’s organizations to answer this question)?  |  |  |
| **Political Will** |
| Has a budget been designated to implement the gender strategy or gender equality strategic goal?  |  |  |
| Are gender issues routinely addressed in training on other topics (ie: as part of agriculture extension training given to government extension agents)?  |  |  |
| Are the policies on pay equity, maternity leave, promotion equity and similar enforced?  |  |  |
| What is the ratio of women to men * + 1. in executive leadership?
		2. In staff/general membership?

*For this question, rather than answering “yes” or “no,” write the ratios in the space provided.* |  |
| **Accountability** |
| Does the organization have a quota and/or program to encourage women in leadership positions?  |  |  |
| Are gender equality tasks integrated into job descriptions?  |  |  |
| Does the organization use sex-disaggregated data to plan and manage its work and budgets? |  |  |
| Do the organization’s policies on pay equity, maternity benefits, health benefits, parental leave, transport, and other issues meet or exceed national government legislation?  |  |  |
| Do the organization’s orientation and professional development programs include opportunities for training in gender equality?  |  |  |
| **Technical Capacity** |
| Does the staff demonstrate gender equality technical expertise sufficient to fulfil the GE tasks related to their job descriptions?  |  |  |
| Does the organization have gender-specific programming?  |  |  |
| Does the organization produce tip sheets, tools or guidance notes on gender equality as it relates to its work?  |  |  |
| Does the organization partner with women’s organizations?  |  |  |

**Tool 4: Administration and Analysis**

**Before You Administer the Tool**

1. This checklist is designed to provide a rapid assessment of the gender equality fitness of a CARE partner organization. It includes some but not all of the internationally recognised standard criteria for a gender fit organization under InterAction’s four categories of gender equality organizational development: organizational culture, political will, accountability and technical capacity. It is closely aligned to the criteria that the Canadian International Development Agency (CIDA) uses to rank its partners. The checklist is not meant to replace the type of comprehensive, participatory exercise that would typically take place as part of an initial assessment of partner fit. Instead, it is meant to rapidly assess whether a partner has the organizational building blocks necessary to achieve sustainable gender equality programming results. Ask the same person(s) the same questions on the checklist each year and record the results in LINKAGES annual reports.
2. The tool is general and meant to be used with many types of partners. It will need some modification before it is used, but almost all of these questions are relevant to any type of organization, from a grassroots community grain bank to a regional NGO to a government department.
3. There are two ways to use this tool, and the team will need to decide on which way they are going to use.
	1. **Rapid assessment method:** Using participant observation, a one-on-one meeting with key partner staff, or a focus group discussion to answer the questions in the checklist with the partner using a closed answer style.
	2. **Action research method:** Use the questions below as a skeleton checklist and build a more participatory action research process with the partner, in which partner staff are assigned various questions below, answer them through research interactions with colleagues. Answers are more open ended and the group debriefs to answer the question:

**“What have we learned about the gender equality fitness of our organization?”**

1. Set up a space in your project database to compare the answers from the baseline, Year 1 and subsequent years. Use the examples below.

**After Baseline Data Has Been Collected**

1. Identify the number of “yes” answers and the number of “no” answers under each of the four categories. Identify the percentage of women and men in leadership positions and in regular positions. Identify where the organization’s strengths and weaknesses are and use this to start a discussion or formulate a plan for organizational strengthening.
2. **Analyse findings** using the following questions.
* Does the organization have at least one “yes” in all four areas of organizational development?
* If the organization currently does not have a gender equality strategy or goal, how will it work towards one during the lifetime of the project?
* If the organization currently does not designate funding towards implementing this goal, how does this affect the effectiveness of the organization?
* Are the number of women in leadership positions proportionately equal to the number of women in membership positions (ie: if there are 40 female and 60 male members, are there at least 4 women on the executive?)?
* Are there relatively equal numbers of women and men in the organization?
* How does the organization currently hold itself accountable for gender equality results?
* To what degree is each and every staff member aware that they have a gender equality job to do as part of their membership in the organization?
* How might weaknesses in one of the four areas affect the ability of the organization to perform in other areas?
1. Use the answers to these questions to assist the organization in creating a gender equality capacity building plan (if it doesn’t already have one).

**After Year 1 of the Project**

1. Prepare charts to compare the responses from baseline with those of Year 1.

**Sample Baseline Checklist Responses**

| **Organizational Gender Equality Assets** | **Yes** | **No** |
| --- | --- | --- |
| **Organizational Culture** |
| Does the organization have a gender strategy or gender equality goals in its strategic planning document?  |  | ✓ |
| Do annual reports, general publications and promotional material discuss gender issues and the organization’s gender equality programming?  | ✓ |  |
| Is the physical space in the organization friendly for both female and male employees? (Separate washrooms for men and women in good order; female staff has the same calibre of technology as male staff; female and male staff have equal access to cars and drivers; etc.)  |  | ✓ |
| Does the organization have a reputation of addressing gender equality as part of its work (check with local women’s organizations to answer this question)?  |  | ✓ |

**Sample Year 1 Checklist Responses**

| **Organizational Gender Equality Assets** | **Yes** | **No** |
| --- | --- | --- |
| **Organizational Culture** |
| Does the organization have a gender strategy or gender equality goals in its strategic planning document?  | ✓ |  |
| Do annual reports, general publications and promotional material discuss gender issues and the organization’s gender equality programming?  | ✓ |  |
| Is the physical space in the organization friendly for both female and male employees? (Separate washrooms for men and women in good order; female staff has the same calibre of technology as male staff; female and male staff have equal access to cars and drivers; etc.)  |  | ✓ |
| Does the organization have a reputation of addressing gender equality as part of its work (check with local women’s organizations to answer this question)?  |  | ✓ |

1. Compare the results of each year using **analytic questions** such as the following.
* What progress did the organization make towards gender equality fitness over the year?
* What changes were hard to make and why? Easy to make and why?
* What changes required a real shift in how organization members think about gender equality or treat one another?
* What were the most effective methods of making change?
* How do organization members anticipate sustaining changes in subsequent years?
* Were the changes made because
	+ one individual championed them?
	+ members were generally motivated to work for the change?
	+ there as a gender technical expert present?
	+ of another reason?

**At Project End Line**

1. There are a number of possible ways in which LINKAGES can look further at the gender equality capacity and fitness of its partners. These will be discussed over the lifetime of the project and further support provided as needed.