Gender equality training toolkit

Comprising of *Training manual*, *Training handouts*, and *Learning pack*

HelpAge
International

Gender equality training toolkit

Comprising of
Training manual →
Training handouts →
Learning pack →

HelpAge International is a global network of organisations promoting the right of all older people to lead dignified, healthy and secure lives.

Contributions from HelpAge International
Global Gender Learning Group

Gender equality training toolkit

Comprising of *Training manual, Training handouts,* and *Learning pack*
Published by HelpAge International

🐦 @HelpAge   ⓕ HelpAge International

Gender equality training manual

Part of the HelpAge International
Gender equality training toolkit

Gender equality training manual

Contents

Introduction

Gender equality means equal rights, responsibilities, opportunities and treatment of women, men and people of other genders. It is not about one group gaining more power to the detriment of another, rather it is about ensuring that all persons are treated with dignity and can develop their full potential. HelpAge International's position is that all older people should be recognised and respected as individuals with equal dignity, to be embraced equally and treated fairly and without discrimination, whatever their diverse and overlapping identities, values, beliefs or needs.

Our 2030 Strategy commits us to achieving impact on the wellbeing, dignity and voice of older people in their diversity. We will leave people behind in this effort if our work is gender blind. HelpAge will ensure all are included, through the promotion of gender equality in our work, particularly towards the empowerment of older women and the transformation of currently unequal gender relations between women and men. We will also seek better evidence so we can better understand and address specific gendered inequalities that older men may face. In addition, we will remain sensitive to gender identities not expressed within binary categories.

In taking these commitments forward, we recognise that gender affects us all and that equality between genders benefits all – individuals, families and communities – and is therefore a population-wide issue. For instance, older women make substantial economic and social contributions to society. They also represent an important and growing political constituency in both developed and developing countries. Recognising and supporting their full participation will benefit the health and well-being of individuals, families, communities and nations.

Gender should therefore not be treated as a separate issue, but rather as a "lens" through which we view and plan all our work. Gender-sensitive work therefore goes beyond targeting equal numbers of male and female participants – it is about redressing imbalances and tailoring activities to the specific needs and interests of women, men and people of other genders.

Consideration of gender in our work can help us identify whether our approach to gender helps or hinders equal opportunities and outcomes for women and men across each of our Strategy 2030 focus areas.[1] While it is often women who have less access to resources, power and opportunities, men's lives may also be adversely affected by their gender roles. Equality does not mean that women and men become the same, rather that women's and men's rights, responsibilities and opportunities do not depend on whether they are born, or identify as, male, female or other.

How gender and ageing intersect

- Gender roles can change with age. Older people often fulfil roles that are not typical of their gender, such as older men caring for their grandchildren, and older women heading households.

- Gender-based discrimination, particularly in later life, can be hidden by a lack of sex- and age- disaggregated data. This is a major constraint to developing gender-responsive policies and programmes.

- Gender-based discrimination can accumulate over a person's lifetime and be exacerbated in older age.

- Older women can face double discrimination based on both their age and gender.

- Older men can experience challenges to masculinity that can leave them feeling isolated.

- Older women and men, and older people of other genders are at risk of gender-based violence. It is about abuse of power.

- Understanding our changing gender identities and power relations throughout life is crucial to understanding our experience of ageing.

1. Income security; Healthy ageing; Inclusive humanitarian action; Freedom from violence, abuse and neglect; Lifelong learning; A society for all ages; Age-inclusive systems; A stand against ageism; Technology embraced; A movement for change

Understanding sex and gender

HelpAge has up to now adopted language that reflects a binary understanding of gender in our work on gender equality and gender mainstreaming – that is, recognising just two genders, male and female. However, we recognise that understanding of sex, gender and identity is evolving, and that individuals or groups who do not identify within established gender or social norms often face stigma, discrimination or social exclusion.

In keeping with our organisational values and commitment to gender equality, we recognise that our own language, understanding and capabilities in relation to sex and gender must evolve beyond a binary understanding. This will be a learning process for the organisation for the duration of the 2030 Strategy, and will be informed and guided by the lived experience of the older people we work with and human rights principles and standards. This issue will be more fully addressed in future updates of the training toolkit.

Gender mainstreaming and targeting

In line with our strategy on gender equality, we will continue to review and adapt our "twin-track" approach of gender "mainstreaming" and gender "targeting" to ensure that our work is inclusive and respectful of all older people, whatever their expressed gender identity.

Gender mainstreaming means that gender is considered in everything we do. The starting point for this "gender sensitivity" is gender analysis, which enables us to identify and act to address gender-based inequalities and power imbalances.

Targeted approaches generally seek "gender-transformative" change by promoting older women's voice and rights in order to create gender equality in older people's roles, status, access to and control over resources and influence. Further guidance on these approaches is available in the Learning pack and HelpAge's Minimum standards for gender mainstreaming (see the Annex in the Learning pack).

About this Training manual

This Training manual is designed for HelpAge gender focal points to use for training colleagues, network members and partners to promote gender equality in their work. It is part of a Gender equality training toolkit that also includes a Learning pack and a set of Handouts.

It is designed for those trained to:

- reflect on perceptions of gender and other identities, along the life course and particularly in older age, and challenge unconscious bias
- understand discrimination based on bias towards gender and other identities, particularly with regard to older people
- develop an understanding of why gender analysis is important in all development and humanitarian interventions
- learn how to carry out a gender analysis
- strengthen skills and confidence in facilitation for trainers delivering training to others.

This Training manual includes a section on preparation and planning, sessions for extended training formats, and three modules. Module 1 is a foundational module that looks at perceptions and discrimination. Module 2 is a technical module that looks at gender mainstreaming and analysis. Module 3 is a training of trainers module that strengthens participants' skills and confidence in facilitation. The manual is accompanied by 36 Handouts providing tables, tools, case studies and diagrams to support the training sessions.

How to run the training

The training format you select may be ongoing or intensive, depending on who is being trained and the resources available:

Ongoing, intermittent training You could provide training in blocks, such as two-hour or three-hour sessions. The advantage of this kind of training is that people have time to digest the information about one topic before moving onto the next. In practice, this is often the only choice of format as it more easily accommodates people's schedules. The disadvantage of this format is that it is less likely to address group dynamics or enable deep reflection.

Extended training The other option is a multi-day intensive training, usually residential. To complete all the sessions, you would need a minimum of three days. The advantage of this kind of format is that it allows ample time to delve into complex issues. This format also facilitates team building as it gives participants time to share reflections on the training between sessions. This kind of informal learning can greatly facilitate personal growth and development, and build peer-support opportunities among participants.

The training can be delivered to groups of varying sizes. Individual sessions can be run with as little as three participants but we recommend 12–25 participants as the optimum group size for extended training.

Access for people with disabilities

Keep in mind that participants may include older people and people with disabilities, who may have special requirements. The section on planning and preparation sets out minimum standards for making venues accessible to people with disabilities.

However, a limitation of this first edition of the Training manual is that it does not provide guidance on facilitating sessions for participants with disabilities. Please see the Annex in the Learning pack for recommended resources to support with this.

Planning and preparation

Location, timing and preparation of venue

Consider using an external venue so that participants are not distracted by their work or tempted to go back to their desk during breaks. See if you can afford residential training. If not, choose a location and arrange starting and finishing times that are convenient for participants (taking into account journey times and rush hours, for example).

When sending invitations for the training, find out if any participants have any specific requirements, for example, regarding accessibility, diet or communication.

Prior to the meeting, make sure you consider the following:

- Can persons with disabilities reach the venue? Will they need any special form of transport to get there? Is there money in the budget to cover the cost of transport or a caregiver, if needed?

- Can persons with disabilities enter the venue? For people with limited mobility, is the entrance easy to use, with a ramp or hand rails to help people go up steps? Or is there an alternative entrance available?

- Can persons with disabilities easily reach the meeting room (or bedroom if residential)? Is the meeting room (or bedroom) on the ground floor or if not, is there a lift? Is the floor surface even? Is there enough light for people to see where they are going?

- Can persons with disabilities move around in the meeting room easily? Is the room large enough, is there space for smaller break-out groups? Is there enough floor space for flipcharts and wall space to hang flipchart sheets up? Is the lighting good?

- Can persons with special communication needs take part in the training discussions? Can participants with low vision or hearing difficulties sit near the front? If a participant uses sign language, do you have a sign interpreter?

- Can persons with disabilities use the toilets? Can they be reached easily? Are the doors wide enough? Are the toilets easy to get on and off?

Further resources can be found in the Annex in the Learning pack.

Plan for enough breaks throughout the day. Agree with participants on starting and finishing times. Only allow sessions to overrun if you have participants' consent.

Planning and preparation of sessions

Ahead of the training, familiarise yourself with concepts of gender, age and disability. Use the Learning pack and resources listed in the Annex. This will help you facilitate discussions, respond to questions and feel more confident in your role as facilitator.

This Training manual includes sessions for extended training formats and three modules. Each session includes practical exercises with facilitator's notes, knowledge boxes and learning points. Module 1 is a foundational module that looks at perceptions and discrimination. Module 2 is a technical module that looks at gender mainstreaming and analysis. Module 3 is to support the trainers to strengthen their skills and confidence in facilitation.

You are encouraged to pick and choose modules and sessions based on the needs of your audience and the length of the training. You may decide to spend more or less time on certain sessions. Sessions that are in two parts can be split across two or more days if they are part of a longer extended training.

Ideally, you will have a co-facilitator to lead some of the sessions and to support groups during small group work. They can also keep an eye on timing and energy levels of participants. Together with the co-facilitator:

- Plan who will lead which sessions.

- Prepare energisers that can quickly be used when participants' attention starts to wane (further resources can be found in the Annex in the Learning pack).

- Make sure you are both clear what you expect from group work so that you can support the groups cohesively.

- Prepare handouts or other visual aids in alternative formats for participants with visual impairments, and plan how to support any participants with disabilities to take part in practical exercises or group work (further resources can be found in the Annex in the Learning pack).

- Prepare a "parked" flipchart to collect any questions or comments you do not have time to deal with during the sessions. You can offer to discuss these with the group or on a one-to-one basis after the sessions. Alternatively, you can direct participants to additional resources. It is good practice at the end of the training to go through the parked queries with participants to check if they now have the answers they need or whether they need further information or support.

Session schedule overview

The modules and sessions are shown below. You can choose which of these to include in your training.

Extended training: Introduce, set expectations, provide clarification and evaluate the training

Time needed	Session	Day
10 minutes	1. Introduction	Day 1
20 minutes	2. Rules and expectations	Day 1
30 minutes	3. Wrap-up and evaluation	Day 1
30 minutes	4. Recap and clarification	Day 2
30 minutes	5. Wrap-up and evaluation	Day 2
45 minutes	6. Recap and clarification	Day 3
45 minutes	7. Wrap-up and evaluation	Day 3
10 minutes	8. Releasing the bird	Day 3

Module 1: Reflect on our perceptions of gender and other identities and challenge our unconscious bias. Understand discrimination based on bias towards gender and other identities

Time needed	Session
45 minutes	1. New beginnings (part 1)
30 minutes	2. Wheel of identity (part 1)
30 minutes	3. Body mapping
60 minutes	4. 24-hour day
60 minutes	5. Game of life
60 minutes	6. Prejudice, discrimination and barrier analysis
30 minutes	7. Wheel of identity (part 2)
30 minutes	8. New beginnings (part 2)

Module 2: Develop an understanding of gender mainstreaming and support gender action planning. Strengthen skills in gender analysis through practice

Time needed	Session
30 minutes	1. Gender mainstreaming (part 1)
60 minutes	2. Gender analysis (programmatic)
45 minutes	3. Gender analysis (practical exercise 1)
90 minutes	4. Gender mainstreaming (part 2)
120 minutes	5. Gender mainstreaming action planning (part 3)
120 minutes	6. Gender analysis (practical exercise 2)

Module 3: Strengthen facilitation skills and build confidence

Time needed	Session
45 minutes	1. Facilitation techniques
30 minutes	2. Role of facilitator
45 minutes	3. Challenges of facilitation

Extended training sessions

These sessions are for training that extends over a few days. They introduce the training, set expectations, provide clarification and allow for daily evaluation.

Session 1
Introduction – Day 1

Time 10 minutes

Objective Begin on an informal note and introduce participants to each other at the start of Day 1.

Materials None

Preparation None

Procedure Ask each participant to introduce themselves in turn with their name and a word to describe themselves that starts with the first letter of their name. For example:

- *I am lovely Lucy*
- *I am funny Faisal*
- *I am mysterious Mahmood*
- *I am curious Caitlin*

You can carry out the exercise while everyone is sitting down, or you can ask everyone to stand or sit in a circle and accompany their description of themselves with a movement or gesture.

Session 2
Rules and expectations – Day 1

Time 20 minutes

Objective Clarify and document what participants expect from the training and what they might be worried about at the start of Day 1.

Materials
- Flipchart paper
- Marker pens
- Masking tape or Blu-tack
- Post-its or small pieces of card or paper in two different colours

Preparation **1.** Write the objectives of the training on a flipchart.

2. Display the flipchart outlining the objectives of the training on the wall. Leave it there for the entirety of the training. You can refer to it during subsequent sessions.

3. Post two more sheets of flipchart paper on the wall, headed "Content" and "Format".

Procedure **1.** Give each participant some post-its or cards (all the same colour). Ask them to write down their expectations of the training content and format (one expectation per card).

Ask them to stick their post-its or cards onto the prepared flipchart sheets under the relevant headings.

2. Give each participant a post-it or card of the other colour. Ask them to write down what worries them about both the content and format (one worry per card) and stick them on the appropriate flipchart sheets.

3. Read out participants' expectations and worries. Reassure participants about which expectations will be met and which worries will be addressed. Identify issues that might need to be "parked" for later, monitored, or cannot be dealt with (for example, expectations that are unrealistic or not in keeping with the agenda).

4. Use the results to agree some ground rules. These may include starting and ending sessions punctually, respecting everyone's opinion and contributions, not interrupting people, protecting confidentiality, and keeping laptops and phones turned off. Write these on another sheet of flipchart paper and display it on the wall.

Facilitator's note

This session provides a visible record against which you can check participants' progress over the course of the training. It highlights areas of consensus or disagreement. This can give you an indication of what you might need to spend more time on, or how you might need to adjust the way you facilitate.

It is helpful to refer back to the flipcharts towards the middle and the end of the training and check with participants how far their expectations have been met.

Session 3
Wrap-up and evaluation – Day 1

Time   30 minutes

Objective   Identify key learning points at the end of Day 1.

Materials
- Flipchart paper
- Marker pens
- Post-its
- Bowl of sweets and/or fruit

Preparation   Take three sheets of flipchart paper and draw a different emoji on each one: a smiley face, one with a blank expression and one looking sad.

Procedure

1. Ask participants to sit in a circle and pass round the bowl of sweets and/or fruit.

2. Ask each person, as they take a sweet or fruit, to name two things they have learnt or to comment on something, such as what struck them most during the day.

3. Hand round post-it notes and ask participants to write down any comments they have about the day, including the logistics (such as breaks, snacks or venue), facilitation (such as pace, clarity, fun factor) and the content. Tell them to write only one comment per post-it.

4. Ask them to put the post-its on the sheets of flipchart paper under the corresponding emojis.

5. Choose up to three participants to do a 10-minute recap of the main outcomes of the sessions from Day 1.

Session 4
Recap and clarification – Day 2

Time   30 minutes

Objective   Remind participants what they have learnt, clarify any issues and ask if they have any further comments or suggestions at the beginning of Day 2.

Materials   None needed. However, you may want to refer back to flipcharts from previous sessions.

Preparation   Select up to three participants to do the recap of Day 1.

Procedure   **1.** Ask the selected participants to provide a recap (10 minutes).

    2. Allow 20 minutes for discussion.

Session 5
Wrap-up and evaluation – Day 2

Time 30 minutes

Objective Identify key learning points at the end of Day 2.

Materials
- Flipchart paper
- Masking tape or Blu-tack
- Marker pens

Preparation **1.** Stick two pieces of flipchart paper together along the long edge to create a large piece of paper.

2. Draw X and Y axes.

3. Label the X axis "Training sessions". Write the names of sessions along the X axis (e.g. New beginnings, Wheel of identity, Body mapping).

4. Label the Y axis "Mood". Mark number from negative to positive (e.g -5 to +5).
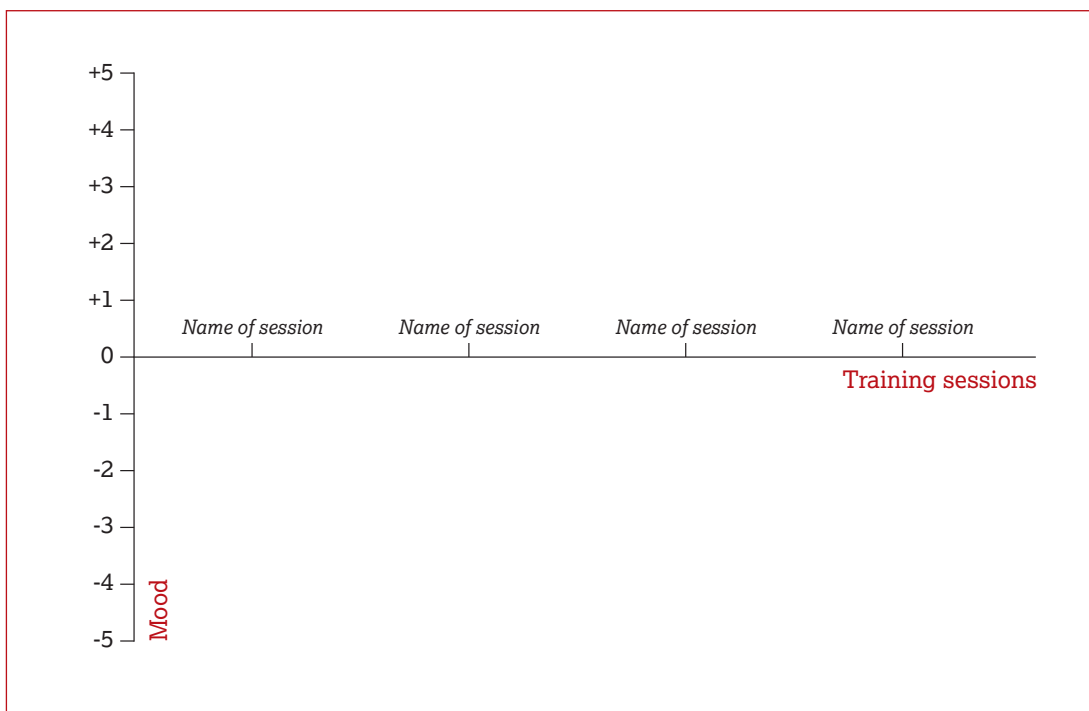
Procedure **1.** If there are more than 12 participants, divide participants into two groups and give each group a large sheet of flipchart paper with the axes marked on it.

2. Ask participants to rate their mood along the Y axis during the different sessions. Overall, do they feel the trainer has met the objectives of the day? Leave the room during this exercise or be obviously busy to give participants some privacy.

Session 6
Recap and clarification – Day 3

Time   45 minutes

Objective   Reinforce learning and provide further clarification at the beginning of Day 3.

Materials   Notes and flipchart presentations from Day 2.

Preparation   None

Procedure   **1.** Recap on the sessions from Day 2 and ask participants what key points they remember from these.

2. Ask if anyone needs further clarification. Refer to any issues that may have been parked during the training.

Session 7
Wrap-up and evaluation – Day 3

Time 45 minutes

Objectives Review whether participants' expectations have been met and their worries addressed at the end of Day 3.

Encourage participants to draw up an action plan for further training and reflection.

Materials
- Original expectations and worries post-its
- Bowl of sweets and/or fruit

Preparation None

Procedure **1.** Ask participants to think back to their expectations and worries. Ask them if they feel their expectations have been met and worries addressed?

Tell them they have 10–15 minutes.

2. Emphasise that learning will continue through practice. Suggest that the group stay on touch with each other to exchange experiences and support each other.

3. Ask participants to pass round the bowl. As each person takes a sweet or fruit, ask them to say what their next action will be. What will they do over the next three months?

Session 8
Releasing the bird – Day 3

Time 10 minutes

Objective Draw the training to a close on a friendly and hopeful note at the end of Day 3.

Materials None

Preparation None

Procedure

1. Ask everyone to sit in a circle and close their eyes.

2. Ask them to reflect on the training and focus on the knowledge and skills they have gained, and the new acquaintances or friends they have made. Ask everyone to open their eyes again. Put your hands together as if you are holding something gently between your palms. Tell participants that you have a small but beautiful bird in your hand that represents all their aspirations and hopes for using their new knowledge and skills to promote the wellbeing, rights and inclusion of older people.

3. Let the imaginary bird grow between your hands. Announce that you will set it free. Count down with everyone from three to zero and release the bird into the air.

Module 1
Perceptions and discrimination

This module supports participants to reflect on their perceptions of gender and other identities and challenge their own unconscious bias. It aims to help them understand how unconscious bias can lead to discrimination.

Session 1
New beginnings (part 1)

Time   45 minutes

Objectives   Raise participants' awareness of how stereotypes, prejudices and assumptions influence the way we perceive and relate to other people.

Help participants understand unconscious biases and learn how to counter these.

Materials   Handout 1: New beginnings – the people

Preparation   None

Procedure

1. Give each participant a copy of Handout 1.

2. Tell participants that this is the first part of a two-part exercise. The second part will take place at the end of the training.

3. Ask participants to spend 10 minutes individually deciding which eight people from the list on Handout 1 they would choose to start a new community.

4. Divide participants into groups of 3–5. You can either decide on the groups or let people choose. Ask each group to agree, as a group, which eight people they would choose to start a new community. Tell them they have 15 minutes for this. Ask each group to appoint an observer. The observer, as well as participating in the discussion, will take notes on how the discussion is unfolding, including differences of opinion, justifying choices, emotional responses, reaching a consensus, and leadership in discussion and decision-making.

5. Ask each group in turn to present their choice and the observers to briefly feed back on the process. Ask each group:

- Why did you make the decisions you came to?
- What did you notice when trying to make a group decision?
- How comfortable did you feel negotiating with the others in your group or voicing your opinion? Was anything stopping individuals from giving their opinion?

Give particular attention to reasons related to gender, age and disability, but also assumptions about the characters and their personalities.

6. Remind participants that you will come back to this exercise at the end of the training.

Facilitator's note

Keep the groups' choices and observation notes. Prepare a summary of similarities and differences, both in choices and justifications. You will need this when you revisit the exercise and reflect on prejudice, social norms and exclusion.

Session 2
Wheel of identity (part 1)

Time   30 minutes

Objective   Make participants aware of the fact that everyone has multiple identities, and that it is important to acknowledge this and see the whole person.

Materials
- Pens or crayons of different colours
- Masking tape or Blu-tack
- Handout 2a: Wheel of identity
- Handout 2b: Wheel of identity (part 1; example) – for facilitator

Preparation   None

Procedure   **1.** Give each participant a copy of Handout 2a: Wheel of identity.

2. Ask participants to write the various identities that they feel make them who they are in each of the eight segments of the central circle. For example, their gender, sex, sexual orientation, disability, educational level, employment status, role in the family, nationality, residence, age, ethnicity, religion and so on. Tell them that if they feel any identity is too personal to share but still important, they can leave the space blank or put "personal". Explain that people's identities are layered, some being more significant than others. Use Handout 2b: Wheel of identity (part 1; example) to guide you.

3. Ask participants to rank their different identities according to how important they feel they are at present. When these are joined up these will produce a "wheel of identity" looking like a spider diagram.

4. Ask participants to mark any of their identities that they feel have a low value in their society with an arrow pointing down, and any that are highly valued with an arrow pointing up.

5. Give participants 15 minutes to complete the task (giving the instructions in stages). Then hang all the spider diagrams up for everyone to see. Give participants five minutes to look at the display. Ask one or two participants who have not spoken much to explain their wheel of identity. If they are reluctant to do this, ask someone else.

6. Explain to participants that you will come back to this exercise towards the end of the training.

Facilitator's note

Tell participants to avoid using individual personality traits, such as "creative", "passionate", "supportive" or "hard-working" to identify themselves. Ask them to use terms that can be applied to groups of people, such as "activist", "professional", "sister", "athlete", "lesbian" or "disabled".

Learning points

Highlight the importance of remembering that every person is made up of more than one identity and that our different identities sometimes intersect in complex ways. Tell participants that you will discuss this in more detail later.

Explain that even if we are interested primarily in one particular group of people, such as women, persons with disabilities, older people or adolescents, they all have other identities that also affect their lives and make them who they are.

Session 3
Body mapping

Time 30 minutes

Objective Enable participants to understand the difference between sex and gender, and to recognise and challenge stereotypes about women and men.

Materials
- Flipchart paper
- Marker pens
- Masking tape or Blu-tack

Preparation None

Procedure **1.** Divide participants into single-sex groups of 3–5 people per group. If possible, keep people with similar cultural backgrounds in the same groups.

2. Give each group a sheet of flipchart paper and ask each group of women to draw the outline of a woman, and each group of men to draw the outline of a man. Flipchart paper can be joined together to produce a large sheet if necessary.

3. Ask one women's group to think about the "typical" characteristics of a woman in their society – what a women does, how she acts, her personality, skills and so on. Ask them to write or draw these characteristics on, or next to, the appropriate part of the female body outline. For example, they might draw a baby close to her stomach, and tools and equipment that she uses at home or at work by her hands or feet. They might write words describing her personality around her head.

4. Ask another women's group to do the same for an older woman.

5. Ask one men's group to do the same for a man. Typical drawings might include a beard, strong muscles, and tools or symbols representing his work responsibilities. Words could describe a personality commonly associated with a man.

6. Ask another men's group to do the same for an older man.

7. Tell participants this is a brainstorming exercise focusing on what we spontaneously associate with women and men, and older women and men, including our own stereotypical associations.

procedure for this session continued over

Facilitator's note

If there are not enough participants of different genders to form four single-sex groups, you could have one women's group and one men's group. Ask each group to spend 10 minutes identifying typical characteristics of women and men, and then to add (maybe in a different colour) characteristics typical of older women and men.

Alternatively, you could have one group looking at age-unspecified women and men, and another looking specifically at older women and men. For mixed-sex groups, appoint an observer to each group to note discussion points, points of consensus and differences of opinion.

Participants will probably identify stereotypical characteristics. The point of the exercise is to recognise and challenge these stereotypes during the discussion that follows.

Procedure *continued*

8. Bring the groups together. Hang up the drawings and discuss them, asking the following questions:

- Does everyone agree with the characteristics attributed to the woman, man, older woman and older man? Which characteristics might be controversial? Which are stereotypical? Was it easy to reach a consensus or were there disagreements within the group?

- Which characteristics are biological or physiological (such as breastfeeding, menstruation or having a beard) and which are based on social norms (such as ideas of femininity or masculinity or what behaviour is acceptable for women and men).

- Which characteristics cannot easily be changed?

- Which characteristics change as people age?

- Which characteristics are associated with values, such as being a "good" wife or a "strong" protector of the family? Are any values more important than others? If so, is there any link with age? For example, a younger woman can give birth naturally but a post-menopausal woman no longer can. Does this difference affect women's roles and their value in their household or community as they age? A young man may be valued for his physical strength and capacity for hard work, but an older man may lack these qualities. How does this affect the value attached to men as they age?

- Ask participants if the typical characteristics and values attached to women and men have always existed, or whether they know of any time when they were different (not in their own lifetime but in society as a whole)?

- Ask participants about whether they feel there are any potential benefits of changing any of these characteristics and values.

- Ask participants what the implications of attributing typical characteristics and values to women and men are for lesbian, gay, bisexual, transgender or other people, such as those whose gender is different from their assigned sex. (For more information on this, see the Glossary in the Learning pack and Section 1: Sex, gender and sexual orientation in the Learning pack module 1.)

Learning points

Participants should now understand which differences between women and men are biological and which are determined by society (the difference between sex and gender).

Emphasise that it is not always easy to decide what is purely female/feminine and male/masculine, there is a wide male-female spectrum. People can be at different points on this spectrum. Their position can change. Some characteristics are true for everyone regardless of gender.

Point out that many more gender-related characteristics are constructed by society than are purely biological, and that these may change over the life course.

Participants may not understand the point of the body maps to begin with. However, by the end of Module 1 the activities around gender stereotypes should help them understand, so keep the body maps to hand as a reference point.

Session 4
24-hour day

Time 60 minutes

Objective Improve participants' understanding of gender roles and responsibilities, needs of people of different genders, and how gender roles are linked to societal values and power relations.

Materials
- Flipchart paper
- Marker pens or crayons of different colours
- Handout 3: 24-hour day
- Handout 4a: Gender roles and needs
- Handout 4b: Gender roles and needs (exercise)
- Handout 4c: Gender roles and needs (completed exercise)
  This is optional (see Facilitator's note)
- Printout of Knowledge box: Gender relations
  (to hang up after the discussion)

Preparation Participants will be divided into groups. Draw a blank table on a sheet of flipchart paper for each group as shown below. You can enter one or two details so participants see what they will be asked to do.

Time	Younger woman's task	Older woman's task	Younger man's task	Older man's task
3.00am	Wake up			

If you find that participants struggle to use the table, you could draw a large clockface on each sheet and ask them to use that instead.

Procedure **1.** Divide participants into single-sex groups of 3–5 per group.

2. Give each group a sheet of flipchart paper with the blank table (or clockface) on it. Ask the groups to choose a specific "professional" group of people that they either belong to themselves or are familiar with (such as farmers, fishers, frontline health staff or social workers). Advise them to avoid choosing groups of people at the extreme ends of the socio-economic spectrum (very rich or very poor people).

3. Ask participants to imagine a day in the life of a wife and husband belonging to the occupational group they have chosen, possibly living with their extended family. Ask them to complete the table for both of the couple over 24 hours on a weekday, starting from waking up. Tell them to include every activity, both work and social, including, for example, fetching firewood or water, visiting friends, sitting in a café, helping children with their homework or travelling to work.

Tell participants they have 20 minutes to complete the task.

4. Once they have finished, hang up the tables. Give participants 5–10 minutes to walk around and look at them.

5. Bring everyone together to discuss the findings:

- Who does the most hours of work from waking up to going to bed?

- What is the balance of work and leisure for women and men, older and younger women, older and younger men, and older women and men?

- What is the difference in the work and leisure balance between women and men in different professional groups?

- What is similar for the women and men of different ages belonging to different professional groups?

- If there is a mismatch between what female participants think are men's tasks and male participants think are women's tasks, ask how these differences might have come about.

What should come out of this is that, in general:

- Women and men do very different things during the day.

- Women work longer hours.

- Women have more varied tasks, sometimes doing more than one thing at once.

- Work for the family is done by women.

- Men's work is done outside the home.

- Men have more leisure time. They have more time off to relax than women and to engage in their hobbies.

- Women have less sleep.

- Men are more involved in decision-making.

- Gender inequalities in the division of work can continue into older age. The types of work people do can also change as they age and become different at "younger-old" and "older-old" ages.

Points for reflection:

- Do you think the differences in women's and men's work and leisure balance may affect their respective wellbeing?

- What does this mean for women and men at different ages?

Time spent caring

Caring responsibilities for children, older people and sick people, as well as household duties, are mainly borne by women. Globally, women spend two to ten times more time a day on unpaid care than men.[2]

2. https://www.oecd.org/dev/development-gender/Unpaid_care_work.pdf

21 Gender equality training manual. Module 1: Perceptions and discrimination

Registered charity no. 288180. Copyright © HelpAge International 2020

Gender roles

Productive roles are activities carried out to secure goods or services for sale to enable people to survive. They include employment, farming and trading.

Reproductive roles are activities that keep families alive and well. They include childbearing, caring for family members and managing the home (such as fetching water and firewood). Reproductive roles are often manual, time-consuming and unpaid.

Community roles are activities that promote community cohesion. They include organising social events such as ceremonies and celebrations, arranging community improvements and serving on committees. Women's community roles are often an extension of their reproductive roles of mobilising, caring and providing, performed on a voluntary, unpaid basis. Men's community roles are often political and include decision-making. They are more often paid and associated with status and power.

Procedure *continued*

6. Explain what productive, reproductive and community roles are (see Knowledge box: Gender roles).

7. Give each participant a copy of Handout 3: 24-hour day

8. Ask participants to identify, with different coloured marker pens or crayons, activities in their table that:

- help generate an income (productive roles), such as fishing (if the fish are to be sold, rather than eaten) or market trading

- support the wellbeing of the family (reproductive roles), such as cooking, fetching water or caring for relatives

- are connected with community activities (community roles), such as attending a village committee meeting.

9. Ask participants to mark the activities with different colours according to whether they represent productive, reproductive or community roles.

10. Discuss with participants which roles and activities are more "visible" and more valued by their community, members of their household and institutions in the society they live in.

Then, using different coloured post-its, compare the distribution of "visible" and "invisible" activities.

Draw a plus or minus sign on each post-it to identify high-valued or low-valued roles and activities carried out by women and men at younger and older ages.

11. Discuss how the value attached to these activities affects power relations between women and men at different ages. For example: is washing clothes (by a woman or man) seen as a valued activity? Is it visible? Is working in construction (by a woman or man) or building a family home, more or less valued or visible? Does it give more power to whoever is carrying out the activity? And what does it mean for an older man who can no longer build, for example, or for an older woman who still cares for the household? Can the balance of power change with age?

- Women often carry out many more reproductive tasks than men. These are time-consuming but unpaid and are therefore not considered "real" work.

- Because much of the work carried out by women is unpaid and therefore not considered "real" work, women are often undervalued by society and perceived as less capable and important than men.

- However, in older age, both women and men may find that expectations of the type of work they do and attitudes towards them change. Women often continue to carry out unpaid domestic work in older age. Men's productive and community roles often diminish as they reach an age at which they are either unable or assumed to be unable to carry out certain activities. Women may find that their value is attached to their unpaid roles in the home. Once they are unable to contribute to the wellbeing of their family, their "value" or status may also diminish.

Practical and strategic gender needs

Because women and men often have different roles, they often have different practical and strategic needs.

Practical needs tend to be immediate and short-term. They relate to things people need to survive in their particular living environment, such as food, housing, healthcare, water and income. Practical needs are met through a combination of productive and reproductive activities, such as providing wells and fetching water, running health centres and caring for sick family members, selling goods at the market to earn money to feed the family and earning an income from employment to meet family expenses. Interventions designed to meet practical needs do not necessarily challenge existing gender roles and norms perpetuating gender inequality.

Strategic needs tend to be long-term. They include legal rights (such as land and inheritance rights), protection from domestic violence, equal pay, and women's control over their bodies. Interventions designed to meet these needs challenge the subordinate role of women in society. They relate to the division of labour (who does what), power and control (who has what and who decides how to use it). Addressing strategic needs means transforming gender relations and promoting gender equality.

Procedure *continued*

12. Explain how the needs of women and men are based on their different gender roles (see Knowledge box: Practical and strategic gender needs).

13. Give each participant a copy of Handout 4a: Gender roles and needs.

14. Go through the explanations of productive, reproductive and community roles again.

15. Give each participant a copy of Handout 4b: Gender roles and needs (exercise).

16. Ask participants, either individually or in small groups, to consider which roles and needs the activities listed on the Handout relate to. Ask them to put a cross in the appropriate spaces on the Handout. Emphasise that each activity could be associated with more than one role or need.

17. Bring everyone together. Compare and discuss the results.

If you are short of time, you could give participants Handout 4b: Gender roles and needs (exercise) to do the exercise as homework or in their own time. A completed table is shown in Handout 4c: Gender roles and needs (completed exercise) for cross-checking.

You can hang up a copy of the Knowledge box: Gender relations as a reminder to participants throughout the training.

Gender relations

- Gender refers to relationships between women and men. These relationships are constructed by society. They are based on people's expectations of women and men and their perceived value in society.

- This means that there is a hierarchy of characteristics associated with women and men, and a hierarchy of roles and responsibilities. These hierarchies affect how women and men are valued. They lead to unequal power relationships between women and men.

- However, the roles of women and men and the power relations between them can change over time. This has happened before and is likely to continue happening. There is a continued opportunity to promote gender equality.

- Most gender roles are context-specific. This means they largely depend on where people live, their cultural background, age, socio-economic status and so on.

- Individual people experience life differently at different ages and life stages. People in different age groups (children, adolescents, younger adults, older adults, etc) and with different marital status (unmarried, married, widowed, separated, divorced, etc) experience gender and power issues differently.

- Gender relations are reinforced by institutional systems such as laws and religious doctrines that reflect the values attached by society to the roles of women and men.

Session 5
Game of life

Time   60 minutes

Objective   Enable participants to understand the hierarchy of gender, disability, age and ethnicity, how this affects people's life chances throughout their lives, and how the intersection of different identities may increase a person's marginalisation.

Materials
- Prompts for the facilitator to describe the story of a person's life
- Labels or stickers for volunteers

Preparation   None

Procedure   **1.** Ask three male and three female participants to volunteer to represent the following characters:

- A woman without disabilities from the dominant ethnic group in their community
- A man without disabilities from the dominant ethnic group in their community
- A woman with a disability from birth from the dominant ethnic group in their community
- A man with a disability from birth from the dominant ethnic group in their community
- A woman without disabilities from an indigenous or ethnic minority
- A man without disabilities from an indigenous or ethnic minority

Stress that this is not a role play. Give each volunteer a label or sticker to wear with their character written on it to remind everyone who is representing which character.

Facilitator's note

You can choose other identities. However, sex must be included and disability should also be included.

---

2. Ask the six volunteers to stand next to each other in a row. Ask everyone else to line up on either side to form a corridor along which the six volunteers can move forward or back. The volunteers should stand halfway along the corridor, all facing towards one end.

3. Explain that you will be telling the life story of different characters, following their journey through life from birth to old age. Ask each volunteer to think about how their character and their character's friends and family will react when they reach a significant life event.

Ask them to take:

- Two steps forward for a very positive or successful experience.
- One step forward for a fairly positive or successful experience.
- One step back for a fairly negative or less successful experience.
- Two steps back for a very negative or unsuccessful experience.

4. Remind the volunteers that they represent a certain category of people. Ask them not to think too much about any specific impairment their character may have or to make any decisions about which direction to move in based on their own experience.

5. After reading out each life event, and after volunteers have moved forward or back, allow time for the other participants to comment on the decisions made by the volunteers. If there is any disagreement, encourage the group to reach a consensus. The other participants may ask the volunteers to change their minds.

6. Set the scene for the life stories. Explain that they take place in a village where there is a fairly high level of poverty, but where most families have land and access to safe water. In the nearby town, there are opportunities for work, as well as health facilities and schools.

7. Start telling the story.

The story

- **One day, after a long wait, you are born. How does your family feel when they see you?**

  Note what might happen:
  - *Woman born without disabilities takes one step forward*
  - *Man born without disabilities takes two steps forward*
  - *Woman born with a disability takes two steps back*
  - *Man born with a disability takes one step back*

- **Now you are a bit older. It's time to start thinking about school. How likely is it that you will be able to go to school?**

- **You are now old enough to be married or in a relationship. You and your partner are discussing how many children to have. To what extent can you decide on the number of children and spacing between them?**

- **You want to make some money for your family. You try to get a paid job. How likely are you to be able to do this?**

- **Now you're in your 40s. You want to help your community by becoming involved in local politics. How likely are you to be able to do this?**

- **Now you have reached older age. Your partner has died and your children have families of their own. How likely is it that you are well provided for?**

- **Now you are well into old age, either with or without a partner. A serious natural disaster has occurred (such as flooding, cyclone, hurricane or earthquake). How likely is it that your needs for emergency assistance will be met?**

Facilitator's note

It is up to you to decide when to intervene. You may want to ask volunteers to give reasons for their decisions and highlight any examples of prejudice or bias.

This exercise is another way of illustrating the hierarchy of gender and how this becomes more pronounced by other factors, such as disability or ethnicity. You can adapt the story according to the cultural context.

Procedure *continued*

8. After you have reached the last event and the volunteers are in their final position, ask the volunteers how they feel about the position they are in.

9. Ask everyone how the gap between the first and last characters can weaken social cohesion? How likely is it that any community will be economically stable and healthy if such gaps exist?

Learning points

The following key messages must come out of the discussions:

- Stigma and discrimination play a large part in creating the gap between the characters' positions at the end of the story. The majority of women with disabilities or from an ethnic minority move back, not because of their capacities but because of people's perceptions of them.

- Women with disabilities are especially disadvantaged. Being so far behind everyone else shows how some groups of women can become overlooked in development programmes. The exercise reinforces their invisibility over time. A common response is to lose motivation and give up.

- All the characters started in the same position (birth) but women started and continued to go back. Education is a key stage at which girls can lose their chance ever to catch up (in terms of employment, income, decision-making, status and so on). Discrimination can be cumulative over the life course and continue into older age. Ageism is a discriminatory experience in itself.

- Events during the life course, such as acquiring a disability or surviving a disaster, can disrupt a person's status. There is no guarantee of anything.

Session 6
Prejudice, discrimination and barrier analysis

Time 60 minutes

Objective Enable participants to recognise barriers to inclusion and understand how stereotyping and discrimination create these barriers.

Materials
- Flipchart paper
- Marker pens
- Post-its (a different colour for each thematic group)
- Masking tape or Blu-tack

Preparation Take three sheets of flipchart paper for each group and draw a brick wall on each. Label the walls "Environmental", "Attitudinal" and "Institutional".

Procedure **1.** Divide participants into groups of 3–5. Give each group three sheets of flipchart paper with the drawings of the walls.

2. Assign each group a thematic area of work, such as humanitarian assistance, community development (older people's associations/intergenerational groups) or social protection. You may want to select participants based on their area of interest or experience.

3. Ask participants to think about prejudice and discrimination against people based on their age, gender, disability or ethnicity. Two or more identities, including gender, can be considered in combination. For example, a group could focus on older women and older men, or on older women without disabilities and older women with disabilities. Focusing on age alone (just older people) is not enough.

4. Ask participants to identify barriers to inclusion faced by people with different identities in the thematic area of work they have been allocated. Ask them to write these barriers on post-its (one barrier per post-it) and stick the post-its on one of the three walls – environmental, attitudinal or institutional. Make sure the examples of barriers are concrete, such as information in formats that some people cannot use, or upper age limits for health programmes, and not just concepts such as stigma, accessibility or prejudice. Use Knowledge box: Environmental, institutional and attitudinal barriers (over the page) to provide examples if needed.

5. Tell participants they have 30 minutes. Walk round the room to check they understand the exercise.

6. Hang the flipcharts up for each group and give the groups five minutes to view each other's walls.

7. Bring the groups together and discuss:

- Where are most of the barriers?
- Which groups of people are most at risk of exclusion?
- What are the specific differences and similarities between barriers in different thematic areas?
- Think about where discrimination happens (such as individual action, institutional processes or social norms). What does this mean when it comes to designing interventions and advocacy initiatives?

notes for this session continued over

Environmental, institutional and attitudinal barriers

The concept of barriers is used by disability activists to explain how a person can be disabled, not because of their impairment, but because of the environmental, institutional and attitudinal barriers preventing them from participating in society. The same barriers can be faced by other groups of people. Recognising these barriers helps to identify issues faced by women, older people and other marginalised groups, and to understand how barriers can build up when multiple identities intersect.

Environmental barriers may include stairs, doorways too narrow for wheelchairs, or written information not available in formats everyone can use. For older people, environmental barriers may include events being held too far away for them to reach or too late in the evening for them to feel safe travelling there. Poor street lighting or positioning women's toilets in isolated parts of buildings are other examples of environmental barriers.

Institutional barriers are policies, procedures and situations that systematically disadvantage certain groups of people. For example, in some societies, women are not allowed to drive or to inherit land or property; people may not be allowed to carry out certain activities after a certain age; children with disabilities may not be allowed to go to the same school as children without disabilities. Such institutional policies and procedures are usually strongly influenced by social norms.

Attitudinal barriers are the beliefs, assumptions, prejudices and stereotyping that lead to discrimination. For example, the assumption that an older employee cannot do as good a job as a younger one; that a woman should not go out without the permission of a male family member or voice her opinion in public unless invited to; or that a child with disabilities is unable to learn and study and will be a burden to their family and society.

- Many barriers to inclusion are connected with each other. Environmental barriers are often linked to institutions, which are made up of individuals. Attitudinal barriers are cross-cutting. They exist almost everywhere.

- Institutional barriers are sometimes subtle. They may seem normal. However, they can have an enormous effect on people's lives.

- There is a link between social norms (common values and beliefs), individual action (such as discrimination based on prejudice and stereotyping) and institutional action (driven by individuals' belief systems and prejudices). Interventions must consider all these factors and how they influence one another.

- Women are more often discriminated against than men. Intersecting characteristics (such as age, gender, ethnicity, disability, sexual orientation or location) can increase barriers to inclusion. Barriers can accumulate over the life course, creating further marginalisation in older age.

- This means that development interventions that aim to be inclusive, but only address certain exclusionary factors, such as age, gender, ethnicity, disability, sexual orientation or location, will leave many women, such as older women, women with disabilities, indigenous women or lesbians, facing barriers to inclusion based on their gender.

- There are numerous barriers facing large numbers of people. It is tempting to focus on supporting individuals to meet their needs. However, a needs-based approach is less likely than a rights-based approach to overcome barriers necessary to bring about lasting change, that is, changes to institutional systems and social norms.

- Based on a detailed barrier analysis, interventions need to find a balance in addressing environmental, institutional and attitudinal barriers. They also need to find a balance between supporting individuals and bringing about broader change (changing social norms).

Session 7
Wheel of identity (part 2)

Time　30 minutes

Objectives　Improve participants' understanding of social norms and values in connection with different identities.

Highlight the power dynamics that exist between different groups of people.

Materials
- Completed Handout 2a: Wheel of Identity from Session 2
- Marker pens
- Handout 2c: Wheel of identity (part 2; example) – for facilitator

Preparation　None

Procedure　**1.** Choose one spider diagram (with the consent of the person who drew it).

2. With the whole group, discuss each identity and agree which is the dominant identity in that particular society, for example, which sex, religion or ethnic group has the most power.

3. Ask each participant to write the dominant identities in each of the eight circles on their own spider diagram. Use Handout 2c: Wheel of identity (part 2; example) to guide you.

4. Discuss with the whole group:

- How many of their individual identities are different from the dominant identity?

- Which characteristics cannot be changed? What does this say about how powerful a person can become?

- What does this say about us as a group? What are the differences and similarities between individuals in relation to dominant power? How can these influence our work?

- What does it say about our relationship with the people we work with and their potential for power?

Session 8
New beginnings (part 2)

Time — 30 minutes

Objective — Participants reflect on changes in their attitudes and understanding of gender issues.

Materials
- Notes and presentations from Session 1: New beginnings (part 1)
- Your summary of participants' responses

Preparation — None

Procedure

1. Ask participants to return to the groups they were in when they discussed the selection of people to start a new community.

2. Ask them to review both their individual and group choices and answer the following questions:

- Would you keep to the same selection or would you change anything? If you would change anything, what would it be and why?
- Would you discuss the selection in a different way?
- How does this exercise link to inclusion?
- Has the training changed or reinforced your attitude towards gender, age or disability?

3. Bring everyone back together. Discuss what has been learnt and what attitudes have been changed or reinforced.

Facilitator's note

After the discussion about selecting people to start a new community, spend a few minutes making the following two points:

- Thinking about prejudice and discrimination often brings to mind acts of blatant prejudice, such as non-inclusive health services or discrimination in the workplace. These are pretty easy to identify.

- We are all "victims" of unconscious bias – beliefs and attitudes that are activated automatically, without our being aware of this happening. These are different from "shameful" attitudes that we are aware of but keep to ourselves. Our unconscious biases come from our experiences. For example:

  – Women are widely portrayed as collaborative, nurturing and homemakers, and men as assertive, competitive and bread-winners.

  – Older people are often stereotyped as more forgetful and less valuable at work than younger workers.

  Biases such as these are constantly reinforced. Do we notice this?

Module 2
Gender analysis and mainstreaming

This module supports participants to develop an understanding of gender mainstreaming and support gender action planning. It also aims to strengthen skills in gender analysis through practice.

Session 1
Gender mainstreaming (part 1)

Time	30 minutes	
Objective	Develop participants' understanding of gender mainstreaming.	
Materials	• Flipchart paper • Marker pens • Cut-out Venn circles in different sizes if required • Handout 5: Gender mainstreaming	
Preparation	None	

Gender mainstreaming

Gender mainstreaming means putting gender equality at the centre of your work. It means considering gender in, for example, policy decisions, planning, budgeting, and organisational structures and operations.

Gender mainstreaming does not mean adding on "something for women" to an existing activity, or ensuring women form a certain percentage of participants, such as 50 per cent of those taking part in training or a project.

Gender mainstreaming may mean changing your goals, plans and actions to ensure that both women and men can influence, participate in and benefit from development interventions. It may require changes to organisational structures, procedures and cultures to create environments that truly help to promote gender equality.

Procedure

1. Ask the groups what they think gender mainstreaming is, using Knowledge box: Gender mainstreaming as a prompt if needed. Give participants Handout 5: Gender mainstreaming.

2. Tell participants they will need to choose a level or area of work – organisational, project or advocacy. Ask participants to get into groups of 3–5, choosing a level or area of work based on their areas of interest or expertise.

3. Ask groups to brainstorm the elements of gender mainstreaming for their level or area of work – what actions must be taken to mainstream gender over time?

- Ask the groups to present their results, either in the form of a Venn diagram, with circles of different sizes to represent the importance of different elements of gender mainstreaming, or simply as a list of bullet points

- Ask groups to mark those elements that are already in place.

Tell participants they have 20 minutes to complete the task.

4. Bring groups back together to compare and discuss the results:

- Highlight any overlaps between projects (or programmes), advocacy interventions and organisations.

- Compare what elements are already in place and what needs to be tackled.

- Ask participants which elements are easy to tackle and which are more difficult.

- If time allows, ask participants to prioritise measures.

In projects (or programmes):

- Collect and analyse sex-, age- and disability-disaggregated data at all stages of a project, starting with baseline data (see the Annex in the Learning pack for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance).

- Use findings from a gender and age analysis to inform the outcomes and activities of the project.

- Select indicators that reflect the anticipated changes and benefits for both women and men.

- Include specific outcomes on gender equality in your monitoring and evaluation (if the project is gender-transformative).

- Design and implement the project in a way that challenges existing gender norms (if the project is gender-transformative).

- Encourage meaningful consultation with and active participation of people of all gender identities at the design, planning, implementation, monitoring and evaluation stages of the project.

- Fully integrate gender and age analysis, and report on gender-related impacts, in project evaluations and reviews.

- Formalise the requirement for partners to mainstream gender in MOUs.

In advocacy interventions:

- Set advocacy objectives that respond to issues identified from gender and age analysis. Your advocacy objectives might not be gender-transformative but it is recommended that they are, at the very least, gender-sensitive.

- Include women, men and organisations with influence on issues around gender equality in your target audience.

- Consider the level of awareness of the audience you are targeting in relation to any gender issues you have identified.

- Conduct an informal assessment and/or intelligence-gathering regarding gender-sensitivity of partners, including network members.

33 **Gender equality training manual. Module 2: Gender analysis and mainstreaming**

Registered charity no. 288180. Copyright © HelpAge International 2020

- Collect and analyse sex-, age- and disability-disaggregated data throughout the advocacy cycle (see the Annex in the Learning pack for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance). Make this data publicly available, with consideration of data protection issues, to encourage its uptake and re-use by key stakeholders.

- Ensure advocacy outputs reflect findings from gender and age analysis.

- Articulate advocacy asks and messaging to:
  - be inclusive of needs (practical and strategic), perspectives, rights and challenges faced by women and men and promote gender equality
  - challenge stereotypes and represent the diversity of roles of women and men in both content and visuals
  - ensure voices of women and men are included in advocacy messaging and language is gender sensitive
  - avoid any gender stereotyping in the language used.

- Design advocacy outputs, including visuals and photos, to be gender balanced.

- Take into account any gender-specific patterns of behaviour or barriers in relation to accessing information in disseminating advocacy outputs (e.g. access to mobile devices newspapers, etc).

- Engage people with influence on gender issues in the dissemination plan.

- Identify gender-sensitive or gender-transformative progress on the part of audiences targeted through advocacy activities.

In organisations:

- Include a gender and age analysis in country and regional business plans and Theories of Actions.

- Identify an active gender focal point in each office.

- Train existing staff on gender equality and induct new staff in HelpAge's Gender equality policy (see the Annex in the Learning pack) within three months of starting.

- Set senior managers a performance objective on gender mainstreaming.

- Include progress on gender mainstreaming in annual reports and present a summary each year to the trustees.

- Collect, analyse and report on sex-, age- and disability-disaggregated data on recruitment, promotion and retention of staff (see the Annex in the Learning pack for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance).

- Ensure a gender balance of selection panels and equality training for selection panel members in recruitment policies and procedures.

- Provide equal pay for all staff performing the same roles.

- Set gender equality targets for senior management positions.

- Provide leadership training opportunities for staff regardless of their gender.

- Have policies on sick leave, childcare and maternity/paternity leave.

- Have policies on protection from sexual harassment, bullying and discrimination.

For more information, please see HelpAge's Minimum standards for gender mainstreaming. This includes a gender marker for assessing how gender-sensitive a project is. It also includes a recommended set of organisational structures to support gender mainstreaming.

For advocacy interventions, please see HelpAge's Gender analysis: a checklist for producing advocacy outputs. This includes a set of gender mainstreaming recommendations for all stages of the production process.

These resources are listed in the Annex in the Learning pack.

Session 2
Gender analysis (programmatic)

Time   60 minutes

Objectives   Strengthen participants' understanding of gender analysis.

Allow participants to practise applying gender analysis in different contexts.

Materials
- Flipchart paper
- Marker pens
- Handout 6a: Gender analysis (exercise)
- Handout 6b: Gender analysis (completed exercise)
- Handout 7: 4-power framework
- Handout 8: Ladder of participation

Preparation   Copy the table from Handout 6a: Gender analysis (exercise) onto a sheet of flipchart paper for presentation.

Procedure   **1.** Go through the six elements of gender analysis, 4-power framework and ladder of participation (as described in Handouts 6a, 7 and 8).

2. Ask participants to form groups of 3–5 (either single sex or mixed sex). Assign each group a thematic area, such as humanitarian action, social protection, health, violence, abuse and neglect, or another area in which they intend to develop an intervention.

3. Ask groups to think of any additional questions relating to each element of gender analysis that they would need to ask about to make sure that their proposed intervention promotes gender equality. What else would they need to know? Where could they find this information? Who could they ask?

Tell them they have 20 minutes to complete the task.

4. When they have done this, ask participants to show where the four powers would go in the gender analysis table (as described in Handout 7: 4-power framework).

Allow them 5–10 minutes to do this.

5. Bring the groups together and ask them to present their gender analysis table.

6. Discuss similarities, differences and gaps. Clarify any points that participants are unclear about.

7. In plenary, ask participants to determine in the table where and how the four powers apply.

Session 3
Gender analysis (practical exercise 1)

Time   45 minutes

Objective   Give participants skills and confidence to interview people for a gender analysis.

Materials
- Handout 9a: Interviewing (livelihood)
- Handout 9b: Interviewing (refugee camp)
- Handout 9c: Active listening guidelines

Preparation   None

Procedure

1. Divide participants into two groups. Explain that they will role-play two interviews, one about a livelihood project and one in a refugee camp.

2. Ask each group to identify three volunteers to play the roles of interviewer, interviewee and observer.

3. Give each volunteer a copy of Handout 9a: Interviewing (livelihood) or Handout 9b: Interviewing (refugee camp). Give the two observers each a copy of Handout 9c: Active listening guidelines.

Tell them they have five minutes to prepare.

4. Ask the volunteers to role-play their interview, following the instructions on the Handout. Ask the others in the group to watch carefully and the observers to take notes according to the instructions on the Handout. If you have plenty of time, you can ask the groups to role-play the interviews one after the other, so that everyone can watch. Otherwise, let the two groups role-play their interviews at the same time and ask the groups to feed back to each other afterwards.

5. Bring the groups together. Ask for feedback from the:
- interviewer
- interviewee
- observer
- audience

6. Discuss with the whole group the key points for sensitive, appropriate interviewing. Write down the Do's and Don'ts on a flipchart.

7. Give participants Handout 9c: Active listening guidelines.

As an interviewer, remember that every person has a unique life experience, built up from both positive and negative experiences. Your role is to ensure that everyone can safely voice their concerns. Be sensitive. Allow enough time for your interviewee not to feel rushed, especially if the subject is sensitive one.

Listen carefully and patiently. Allow the interviewee to speak in their own words and at their own pace. Do not dismiss what they say. If you need to clarify something they have said, use open questions.

Learning points

learning points for this session continued over

Use language that participants can understand, given their knowledge of the subject, language skills, cultural background, age, gender and so on.

Avoid leading questions. Use open-ended questions to obtain full answers. Avoid close-ended questions that can be answered "yes" or "no". Keep your questions short and as specific as possible.

Follow safeguarding procedures. Make sure you obtain the interviewee's informed consent. The interviewee should only provide this after receiving a clear explanation on how the information they provide will be used. None of the activities being carried out should harm any of those involved. Bear in mind that participants have a right to share their story, but that this right must be balanced with your responsibility for ensuring that no harm comes to them as a result of doing so.

Consider the power dynamics that might be at play between you, as the interviewer, and the person you are interviewing. For example, they may feel they have to agree to be interviewed and disclose very personal information because they are involved in a project that your organisation is funding.

Session 4
Gender mainstreaming (part 2)

Time 90 minutes

Objective Enable participants to mainstream gender at all stages of the proposal development process and project and advocacy cycle.

Materials
- Flipchart paper
- Marker pens
- Handout 10a: Advocacy cycle
- Handout 10b: Project cycle
- Handout 10c: Proposal development process

Preparation None

Procedure **1.** Tell participants they will need to choose a context – advocacy cycle, project cycle or proposal development process. Ask participants to get into groups of 3–5, choosing a context based on their areas of interest or expertise.

2. Give each group a copy of the Handout illustrating the context they have chosen (Handout 10a: Advocacy cycle, Handout 10b: Project cycle or Handout 10c: Proposal development process). Ask them to copy the diagram onto a sheet of flipchart paper. Ask participants to identify elements of gender mainstreaming at each stage of the cycle/process. Remind them to identify how gender inequalities affect people of different ages and how the accumulation of inequalities at different ages can lead to widening inequality in older age.

Tell them they have 20 minutes.

3. Bring the groups together. Ask each group to present their suggestions (allowing 30 minutes).

Discuss their suggestions, fill in any gaps and respond to any queries.

Facilitator's note

- Refer back to the findings from Session 1: Gender mainstreaming (Part 1).
- Note links between different contexts, for example:
    - the funding proposal prepares for the project cycle
    - the project cycle generates evidence for advocacy.
- Highlight non-negotiable elements in each context, such as staff training on gender and sufficient gender-responsive resources.
- Use the learning modules as additional resources. Learning pack module 3 includes examples of expected results for each context.

Session 5
Gender mainstreaming action planning (part 3)

Time 120 minutes

Objective Support participants to promote gender mainstreaming within organisations, projects (or programmes) and advocacy interventions.

Materials
- Flipchart paper
- Marker pens
- Post-its
- Handout 11: Gender action plan

Preparation Draw three different pictures on three sheets of flipchart paper (or more, depending on the size of the group) illustrating factors that enable or hinder gender mainstreaming. For example, draw a hot air balloon (enabling), loaded with sand bags (hindering), a bicycle with wheels (enabling) and brakes (hindering), and a raft resting on barrels (enabling), loaded with wooden planks (hindering).

Procedure **1.** Tell participants they will need to choose a level or area of work – organisational, project or advocacy. Ask participants to get into groups of 3–5, choosing a level or area of work based on their areas of interest or expertise. Try not to have more than two groups working in the same area. If necessary, you can divide them into specific teams, such as communications or campaigns.

2. Give each group an illustrated sheet of flipchart paper. Ask them to identify any factors that could enable gender mainstreaming, write these on post-its and place the post-its on the picture.

3. Ask the groups to identify any factors that might hinder gender mainstreaming, write these on post-its and place the post-its on the picture.

Tell the groups they have 20 minutes to do this.
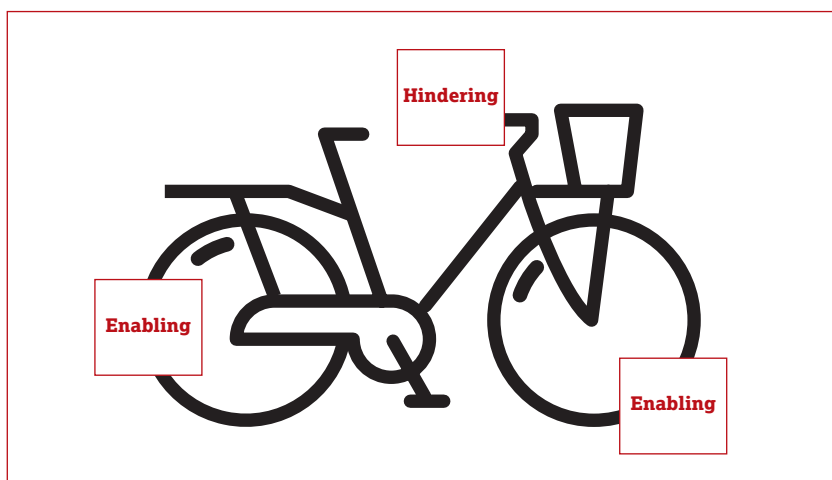
4. Give each group a new sheet of flipchart paper. Ask them to draw a vertical line up the middle. Ask them to label the top "Most significant challenge for mainstreaming" and the bottom "Least significant challenge for mainstreaming".

5. Ask participants to place the post-its describing hindering factors in order from "Most significant" to "Least significant" along the line. No two challenges may have the same ranking.

Give the groups 15 minutes to complete this task.

Most significant challenge for mainstreaming

1
2
3
4
5
6

Least significant challenge for mainstreaming

---
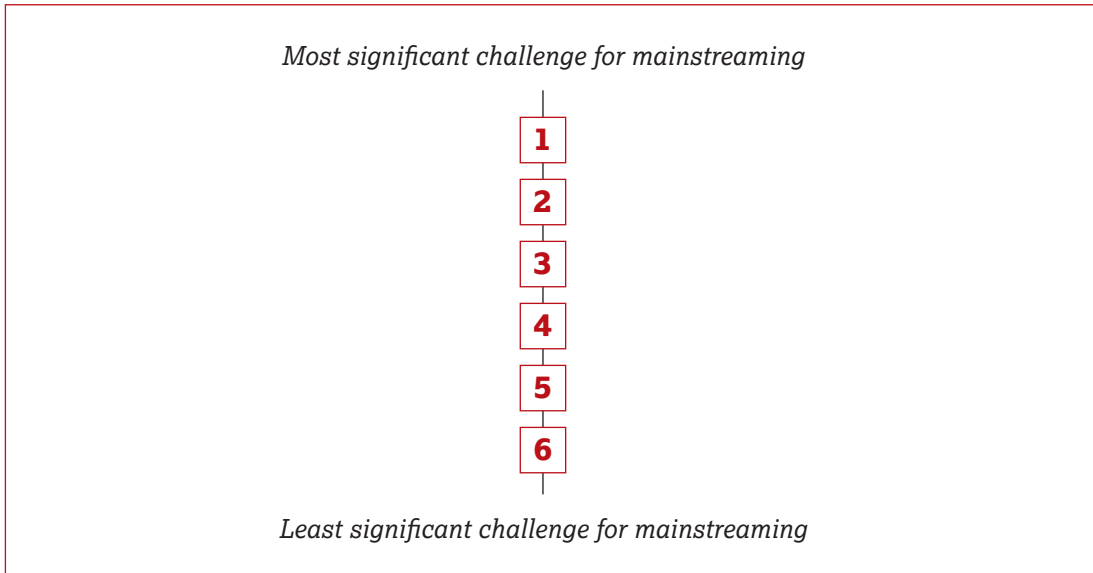
6. Now ask each group to draw a horizontal line across the top of the vertical line. Beneath this, on the left, ask them to write "Easy to overcome" and on the right "Hard to overcome".

Most significant challenge for mainstreaming

Easy to overcome   *Hard to overcome*

1
2
3
4
5
6

Least significant challenge for mainstreaming
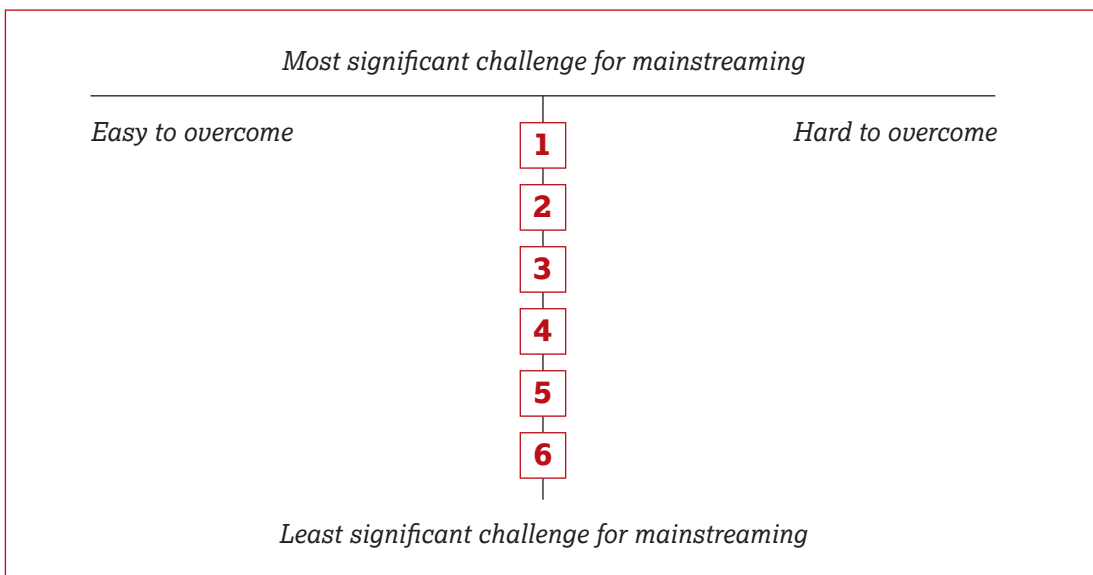
Procedure continued

7. Ask participants to move the post-its to either the left or right according to how easy or difficult it would be to overcome the hindrances they have ranked. The easier or more difficult it is, the further it moves to the left or right. The middle line represents challenges that are neither easy nor difficult.

Give the groups 15 minutes to complete this task.

8. The flipcharts sheets may end up looking something like this:

Most significant challenge for mainstreaming

Easy to overcome   *Hard to overcome*

1

2

3

4

5

6

Least significant challenge for mainstreaming
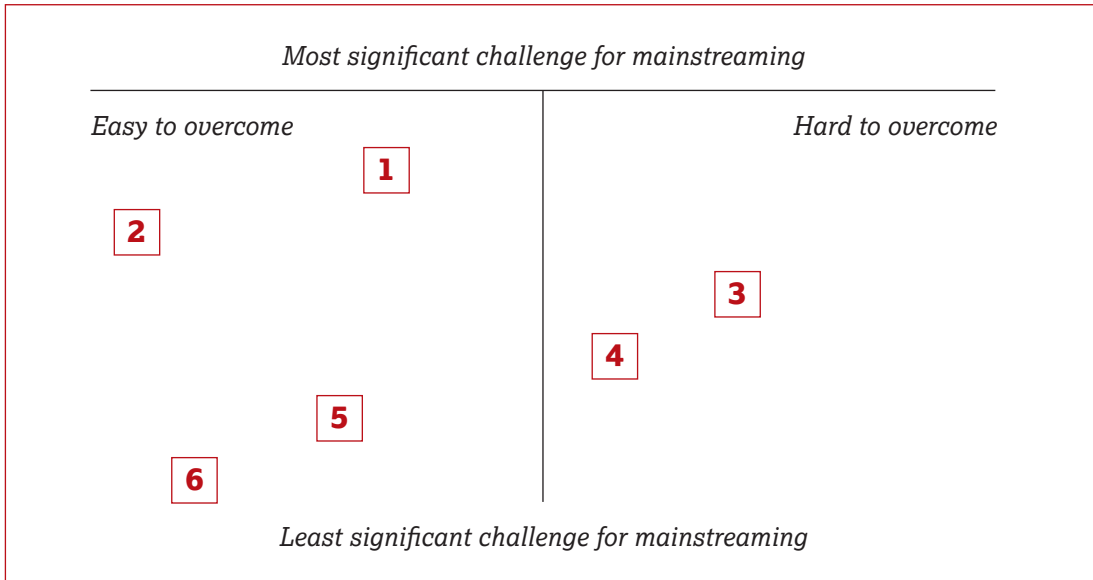
9. Bring the groups back together to present the results and highlight any differences or similarities between the results of groups working on the same areas. Ask if any of the groups had any difficulty reaching a consensus.

10. Give each group a copy of Handout 11: Gender action plan. Ask groups working in the same areas to merge with each other. Ask them to fill in the table with actions to counter each challenge they have identified. There might be several actions needed to address each challenge. Ideally, it would be good for groups to identify quick wins (those ranked easy to overcome) and prioritise action by significance (most significant challenge for mainstreaming first).

Give the groups 30 minutes to complete this task.

11. Bring the groups back together. Ask them to present their action plans. Support a discussion about who they might need to engage with as a next step.

Session 6
Gender analysis (practical exercise 2)

⏰ **Time**   120 minutes

🎯 **Objective**   Enable participants to carry out a gender analysis in different contexts.

📎 **Materials**
- Flipchart paper
- Marker pens
- Handout 12a: Case study – Post-disaster
- Handout 12b: Case study – Water, sanitation and hygiene
- Handout 12c: Case study – Funding proposal
- You can also use case studies from Learning pack module 4, or any other case studies of projects or funding proposals covering the main elements of gender analysis. See Handout 6b: Gender analysis (completed exercise) for what to include.

📓 **Preparation**   None

➡️ **Procedure**

1. Tell participants they will need to choose a case study – post-disaster, water sanitation and hygiene, or funding proposal. Ask participants to get into groups of 3–5, choosing a case study based on their areas of interest or expertise. Give each group several copies of the relevant case study Handout.

2. Ask groups to analyse the case study as instructed on the Handout.

Give the groups 45 minutes to complete this task.

3. Bring the groups back for presentations and discussions.

📋 **Facilitator's note**

Keep the timing of this session flexible. You may have a break between presenting and completing the task. Go round the groups to check their progress and ask if they need any clarification.

📖 **Learning points**

Handout 12a: Case study – Post-disaster

The gender analysis shows:

- Women had reproductive and community roles. Men had community roles.
- Women had the chance to meet their practical needs but kept to their main reproductive roles. Their strategic needs were not addressed.
- Women's participation in decision-making was at level 4. Men's was at level 5.
- The project was gender-sensitive but not gender-transformative as it did not challenge accepted roles and values.

Within their area of responsibility, women were in control and had very important tasks. However, a main focus of the project was on their reproductive activities, whereas men were given the opportunity to plan for the future without involving women. The project did recognise women's many capabilities, though their roles within the project would still be valued less than men's.

learning points for this session continued over

Additional questions could include:

- Who decided to assign the committees their responsibilities?
- Within each committee, were tasks distributed equitably among people of different genders and ages? Were people with disabilities included?
- Did women have any say in the size and allocation of the budget for their tasks?
- Were the women paid for their work?
- Were the men paid for their work?
- Who did women and men report to?
- Were women, including younger and older women and women with disabilities, consulted about plans for the project or any specific needs or priorities they had?

Handout 12b: Case study – Water, sanitation and hygiene

The gender analysis shows:

- Women are earmarked for reproductive roles, not manual labour.
- Both women and men have community management roles.
- Men contribute as labourers. They may be chosen for productive work (maintenance of wells).
- Participation of women and men may look equal in terms of numbers, but the decision-making processes of the committee are not clear.

Additional questions could include:

- How does the committee reach decisions about:
  - women's and men's tasks
  - selecting young men to maintain the wells?
- What is the quality of committee members' participation? How much time do they spend?
- Which households have been allocated piped water? What criteria are used to identify them?
- What responsibility does the committee have for making the wells accessible, monitoring their use, budgeting for their maintenance, etc? How does the committee consider the logistics of arranging activities in the future (such as timing meetings and choosing venues)?

Handout 12c: Case study – Funding proposal

The gender analysis shows:

- Needs assessment data was mostly not broken down by sex. In the needs assessment, 60 per cent of those surveyed were women and 40 per cent were men. This is not gender-equitable. What was the reason for this (for example, more women were available because men were working outside, or there were fewer male refugees)?
- Data on the symptoms of trauma and stress was not disaggregated by sex. Therefore it might not reveal needs that are specific to either women or men. For example, behavioural and relationship problems may appear very different in women and men and require different approaches.
- Data on the need for an income was not disaggregated by sex.
- Older women's reproductive role was emphasised.

Additional questions could include:

- Has it been established who are heads of households (whether male or female)?

- Are peer counsellors paid or unpaid? Does being a peer counsellor increase women's workload?

- Are mobility issues and safety/protection concerns being assessed?

- Are cultural and sports activities accessible to women who may have mobility issues or care responsibilities?

- How will older people be selected to join the clubs?

- What types of businesses are acceptable for women to start up? How is women's safety protected?

- Is the gender representation of staff considered in relation to providing mentoring support?

Learning points *continued*

Module 3
Facilitation skills

This module aims to strengthen participants' skills and confidence in facilitation. It is for training participants who will conduct gender training themselves in the future. It covers facilitation techniques, the role of the facilitator and how to deal with difficult situations.

Session 1
Facilitation techniques

Time 45 minutes

Objective Reflect on facilitation techniques used during the training, focusing particularly on participation and accessibility.

Materials
- Flipchart paper
- Marker pens

Preparation None

Procedure

1. Divide participants into three groups of 3–5.

2. Ask the groups to quickly reflect on one issue of their choice. Write their responses as bullet points on a flipchart sheet.

Ask them about:

- Tools used during the training – what other tools could have been used?

- Techniques and tools used to encourage participation – were there any gaps and if so, what other techniques or tools could have been used?

- Techniques or tools used to make the training accessible – were there any gaps and if so, what other measures could have been taken?

3. Bring groups back together and ask them to present their findings.

Learning points

Tools used may include:

- small group work and plenary discussions, with small groups often being single sex to allow women and men to voice their opinions safely, and subsequent plenary discussions helping to highlight differences and similarities
- role play
- making drawings
- using illustrations and diagrams
- reflection
- "lectures"
- case studies.

Participatory exercises, often in small groups, are more energetic and involve individual participants more than lectures or Powerpoint presentations. Monitor participants' attention levels and use energisers as you see fit. Encourage participants to let you know if they need a break or an energiser.

Session 2
Role of facilitator

Time   30 minutes

Objective   Enable participants to understand the role of the facilitator.

Materials
- Incomplete version of Handout 13a: Role of facilitator
- Post-its

Preparation   Prepare a large sheet of flipchart paper (two or more sheets taped together) with an incomplete version of the Role of facilitator diagram from Handout 13a: Role of facilitator.

Procedure

1. Divide participants into four groups.

2. Assign each group a heading for the role of facilitator:

- Presenting yourself
- Your style
- Training methods
- Being ready and prepared.

3. Ask the groups to identify elements of each role and write these on post-its (one element per post-it).

Tell them they have 10 minutes.

4. Bring the groups together and share the results. Ask the groups to pin their post-its under the relevant branches of the Role of facilitator diagram on the flipchart.

5. Give each participant a copy of Handout 13a: Role of facilitator. Ask them to add to the branches as discussed.

Facilitator's note

As a facilitator, you have several roles that help make the training a positive experience which emphasises sharing, learning and coming to decisions together. You must therefore take a neutral position and not offer your personal opinion unless explicitly asked for it. You must not get drawn into discussions unless to resolve conflict.

Good facilitation enables participants to feel comfortable about speaking out or discussing subjects they might otherwise find difficult, such as attitudes, power-sharing, equality, etc.

As a facilitator, you must be aware of your own personal beliefs, values and prejudices. For example, your views on women's and men's roles, rural and urban people, poor and rich people, people's sexual orientation, disability, religion, ethnicity or culture can all influence how you facilitate the group, what kind of language you use, what jokes you may make and what examples you may choose. Therefore, you will need to recognise your own biases and constantly examine how they affect your role as a facilitator.

Session 3
Challenges of facilitation

Time 45 minutes

Objective Enable participants to practise facilitating and increase confidence in relation to managing groups and dealing with challenging situations.

Materials
- Handout 13b: Challenging situations for facilitation (scenario 1)
- Handout 13c: Challenging situations for facilitation (scenario 2)
- Handout 13d: Dealing with challenging participants

Preparation None

Procedure **1.** Divide participants into two groups. Give each group a different scenario (give one group Handout 13b and the other Handout 13c). Ask each group to prepare a five-minute role play providing a solution to the challenges described in the Handout. Ask them to address at least two of the three challenges.

Tell them they have 15 minutes to prepare.

2. Bring the groups together. Ask each group to present their role play.

Allow 5–8 minutes for each one.

3. Alternatively, if participants are still up for a challenge, you could ask two volunteers to play the facilitators. Let the groups choose the challenges that they want to role-play. Then ask the unsuspecting facilitators to deal with the groups' behaviours.

4. Discuss the solutions. Allow time for questions and comments after each presentation.

5. Reflect together on similar experiences and challenges in finding solutions.

6. Give each participant a copy of Handout 13d: Dealing with challenging participants.

Gender equality training handouts

Part of the HelpAge International
Gender equality training toolkit

HelpAge
International

Gender equality training handouts

Contents

HelpAge
International

New beginnings – the people

People	Your choice	Group choice
Jane She is a 45-year-old experienced teacher. She is HIV positive after having received contaminated blood transfusions as a child.		
Karim He is a 17-year-old who is training to be a plumber. He is interested in environmentally friendly systems. He is usually very friendly, kind and helpful but also experiences sudden behaviour changes when he can become violent.		
Sophie She is 55 years old. She is a midwife but has a legal drugs addiction problem for which she has been suspended a couple of times.		
Julius He is aged 22 and in good health. He had to leave his country of origin where he was accused of having loose morals because of his gender identity. He is a writer who could expect a successful future before he left his country.		
Rolihlahla He is a 68-year-old tribal chief. He has led his community to economic success and ensured it has all the services and utilities available. He can be difficult at times as he thinks he is always right.		
Meenaski She is a 22-year-old beautiful and funny student. Everywhere she goes she lifts the mood. She has not yet decided on what she wants to do for a living. She has suffered from an eating disorder that started when she was 15, although she is currently eating healthily.		
Mamadou He is a 35-year-old expert in farming and fishery and has been instrumental in developing successful projects funded by the World Bank. He is blind and can be arrogant and demanding at times.		
Roberto He is in his late 20s and has learnt survival techniques from working as a guide in the rainforest. He has excellent leadership skills. Roberto has admitted that he abandoned someone to a certain death many years ago, but claims he had to make a choice between saving that person or the rest of the group.		
Juliet She is a 75-year-old retired librarian with five adult children and 15 grandchildren. She is also an expert cook and homemaker. She has recently been diagnosed with having an aneurysm and underwent preventive surgery to reduce risks of rupture.		
Ralf He is a 40-year-old father of three and captain of a fishing boat. He is married but his wife recently left him and took their children with her after accusing him of being violent.		
Salman He is aged 41. He worked for years as a surgeon in conflict-affected areas. He has set up an NGO with his long-term partner, a 45-year-old former soldier, to support people suffering from post-traumatic stress disorder.		
Lydia She is a 30-year-old biologist and a qualified nutritionist. She is a vegan. She abhors intensive farming and livestock raising practices. She is very passionate about the subject.		
Jeema She is a bright 19-year-old who works as a mechanic and is known as a brilliant inventor. She has a significant facial disfigurement.		
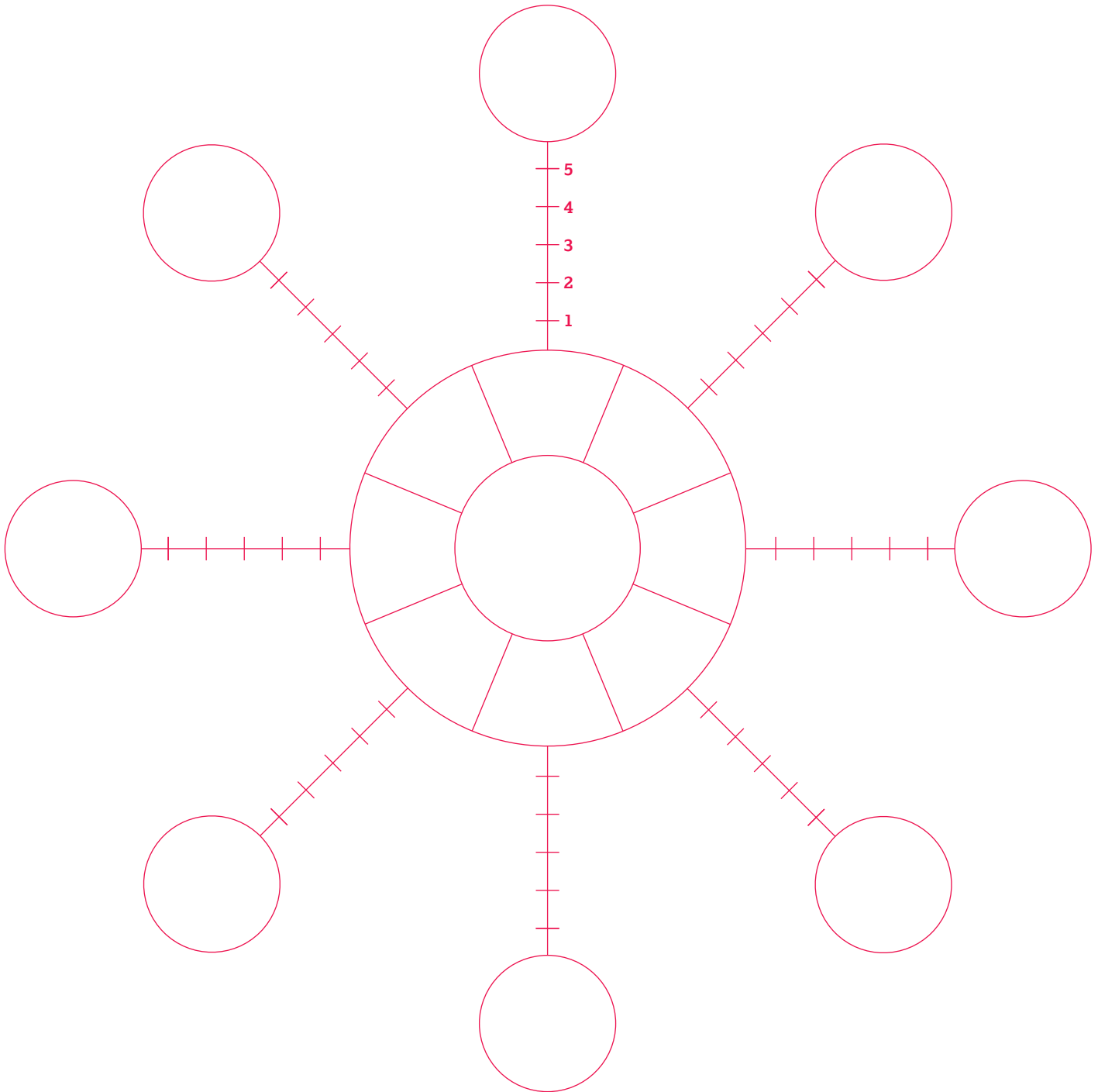
HelpAge
International

5
4
3
2
1

HelpAge
International

Wheel of identity (part 1; example)

5
4
3
2
1

Female

HelpAge
International
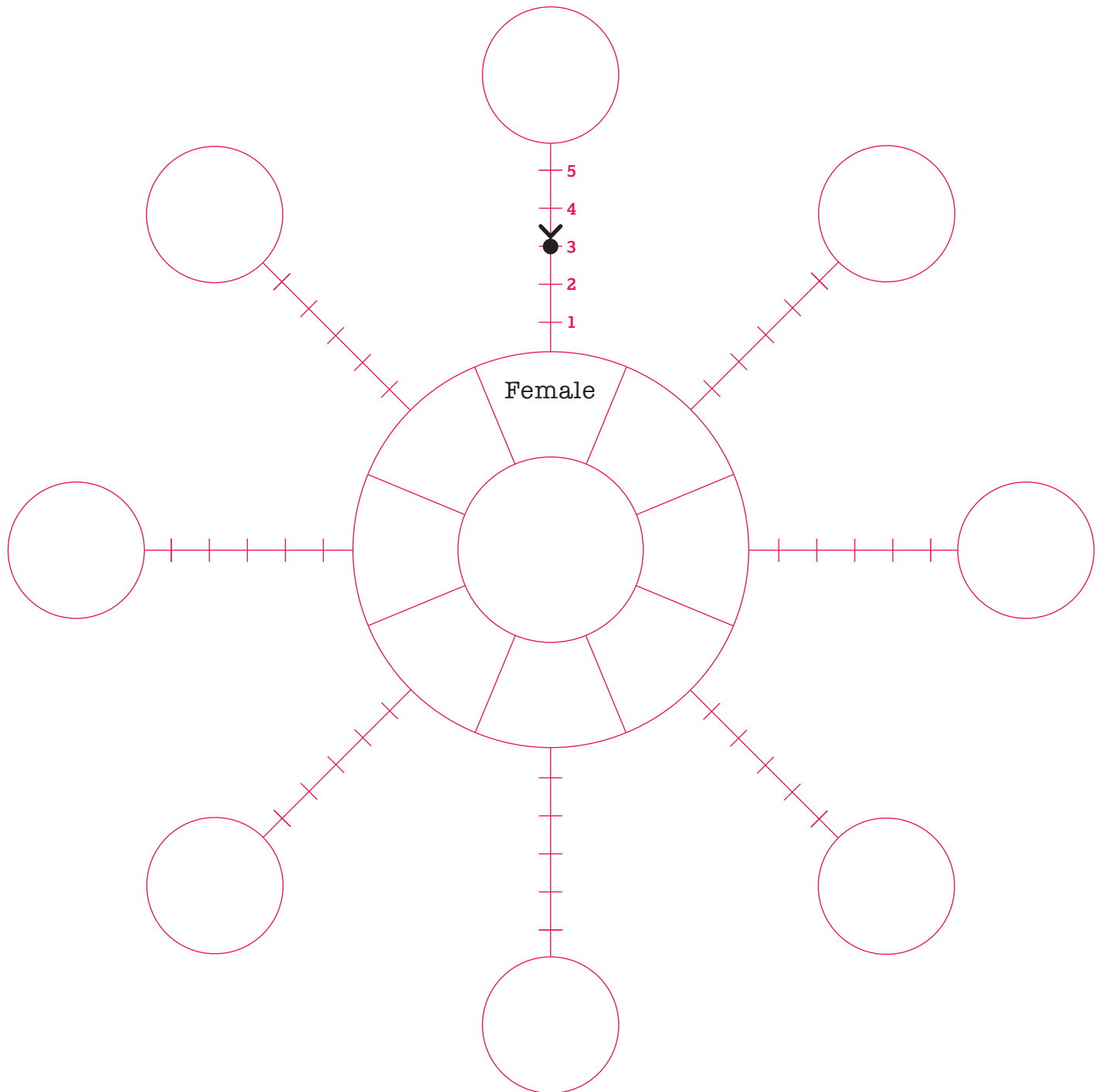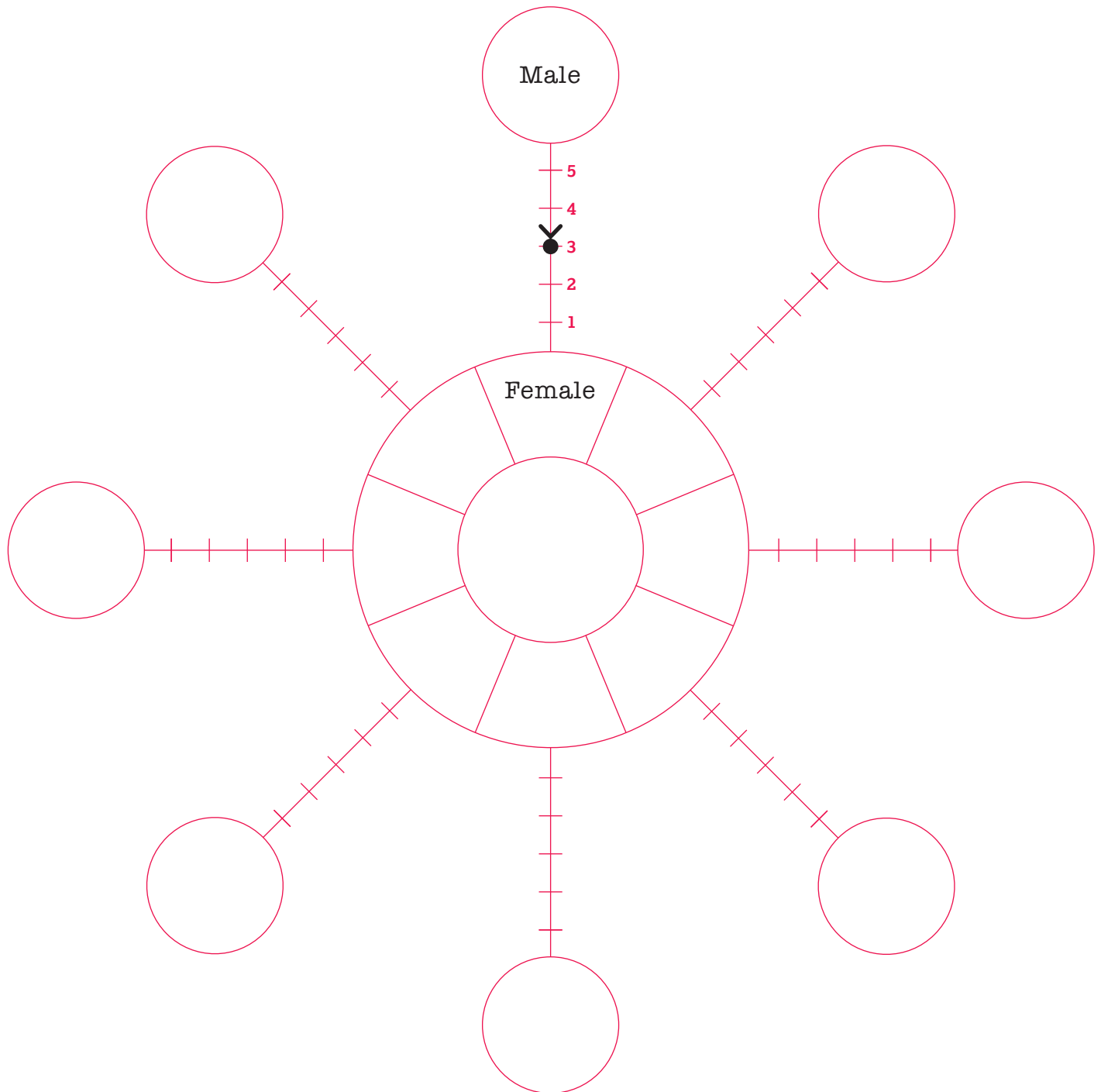
24-hour day

Fill in all activities, such as chores, employment, leisure and social activities. Use the hours given to make the exercise quicker and easier. You do not have to break the time down into minutes.

Time	Younger woman's task	Older woman's task	Younger man's task	Older man's task
03:00				
04:00				
05:00				
06:00				
07:00				
08:00				
09:00				
10:00				
11:00				
12:00				
13:00				
14:00				
15:00				
16:00				
17:00				
18:00				
19:00				
20:00				
21:00				
22:00				
23:00				
24:00				
01:00				
02:00				

HelpAge
International

Gender roles and needs

Gender roles

Productive roles are activities carried out to secure goods or services for sale to enable people to survive. They include employment, farming and trading.

Reproductive roles are activities that keep families alive and well. They include childbearing, caring for family members and managing the home (such as fetching water and firewood). Reproductive roles are often manual, time-consuming and unpaid.

Community roles are activities that promote community cohesion. They include organising social events such as ceremonies and celebrations, arranging community improvements and serving on committees. Women's community roles are often an extension of their reproductive roles of mobilising, caring and providing, performed on a voluntary, unpaid basis. Men's community roles are often political and include decision-making. They are more often paid and associated with status and power.

With the exception of childbearing and breastfeeding, all these roles can be performed by both women and men. However, cultural and social norms often assign specific roles to either women or men, including in older age. Different values are attached to different roles. The hierarchy of roles and the way roles are distributed between women and men leads to unequal power relationships between women and men.

Practical and strategic gender needs

Practical needs	Strategic needs
• Tend to be immediate and short-term	• Tend to be long-term
• Unique to particular women, men or people of other genders	• Common to almost all women, men or people of other genders
• Relate to the things people need to survive in their particular living environment, such as food, housing, healthcare, water and income	• For women, often relate to their disadvantaged position over the life course, subordination, lack of resources and education, vulnerability to poverty and violence, etc
• Easily identifiable by women, men or people of other genders	• Basis of disadvantage and potential for change not always identifiable by women, men or people of other genders
• Met through a combination of productive and reproductive activities, such as providing wells and fetching water, running health centres and caring for sick family members, selling goods at the market to earn money to feed the family and earning an income from employment to meet family expenses	• Can be addressed by consciousness-raising, increasing self-confidence, education, strengthening movements, political mobilisation
	• Include legal rights (such as land and inheritance rights), protection from domestic violence, equal pay, and women's control over their bodies. These challenge the subordinate role of women in society. They relate to the division of labour (who does what), power and control (who has what and who decides how to use it)

HelpAge
International

Handout 4a
Gender roles and needs *continued*

Addressing practical needs	**Addressing strategic needs**
• Project involves women, men or people of other genders as recipients and perhaps participants • Can improve the condition of women's, men's or people of other genders' lives • Does not alter existing gender roles and relations	• Project involves women, men or people of other genders as agents of change or enables them to become agents of change • Can improve the position of women or people of other genders in society through transformation of unequal power relations
Gender-sensitive approach	**Gender-transformative approach**
• Gender and age analysis is done • Gender is apparent in the language. Gender- and age-disaggregated data is used and analysed • Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are included • The intervention is more likely to focus on their practical or immediate needs	• Both quantitative and qualitative gender and age analysis is done • Specific outcomes seek to transform unequal power relations between women, men and people of other genders through changes in roles and status, and redistribution of resources • Gender equality is promoted as a major goal • The intervention aims to challenge existing norms and attitudes that reinforce gender role stereotypes • Gender is built into the response and the causes of inequality are addressed head on

HelpAge
International

Gender roles and needs (exercise)

Consider which roles and needs the activities listed in the table relate to. Put a cross in the appropriate spaces. Note that each activity could be associated with more than one role or need.

Activity	Women's role recognised			Gender need met	
	Reproductive	Productive	Community managing	Practical needs	Strategic needs

Training for employment

Training for women					
• cooking for family					
• tailoring for sale					
• masonry/carpentry					
• business management					
Access to credit*					
Allocated to household					
Allocated to women					

*micro-finance institutions or government

Basic services

Introduction of a crèche					
Located in the community					
Located at the mother's workplace					
Located at the father's workplace					
Primary healthcare centre					
Open only in the morning					
Open at different times					
Social benefits by government					
Allocated to household					
Allocated to women					

Community participation

Projects with community participation					
With unpaid women's time					
With paid women's time					

HelpAge
International

Gender roles and needs
(completed exercise)

The answers are given below.

Activity	Women's role recognised			Gender need met	
	Reproductive	Productive	Community managing	Practical needs	Strategic needs

Training for employment

Training for women					
• cooking for family	x			x	
• tailoring for sale		x		x	
• masonry/carpentry		x		x	x
• business management		x			x
Access to credit*					
Allocated to household		x		x	
Allocated to women		x		x	x

*micro-finance institutions or government

Basic services

Introduction of a crèche					
Located in the community	x	x	x	x	
Located at the mother's workplace	x	x		x	
Located at the father's workplace	x	x		x	x
Primary healthcare centre					
Open only in the morning	x			x	
Open at different times	x			x	x
Social benefits by government					
Allocated to household		x		x	
Allocated to women		x		x	x

Community participation

Projects with community participation					
With unpaid women's time			x	x	
With paid women's time		x	x	x	x

HelpAge
International

Gender mainstreaming

Gender mainstreaming means putting gender equality at the centre of your work. It means considering gender in, for example, policy decisions, planning, budgeting, and organisational structures and operations.

Gender mainstreaming does not mean adding on "something for women" to an existing activity, or ensuring women form a certain percentage of participants, such as 50 per cent of those taking part in training or a project.

Gender mainstreaming may mean changing your goals, plans and actions to ensure that both women and men can influence, participate in and benefit from development interventions. It may require changes to organisational structures, procedures and cultures to create environments that truly help to promote gender equality.

HelpAge
International

Gender analysis (exercise)

Areas of enquiry	Questions
Roles and responsibilities (division of labour)	**Who does what?**
Access to and control over resources	**Who owns what? Who can use what and who has control over it?**
Bodily autonomy, violence and safety	**How widespread is violence and what is the risk of experiencing violence?**
Knowledge and information	**Who knows what and who holds information? Who is information shared with?**
Aspiration and participation	**Who participates at what level and for what purpose? (project-related)**
Duty bearers and institutions	**Who benefits?**

HelpAge
International

Gender analysis (completed exercise)

Areas of enquiry	Questions
Roles and responsibilities (division of labour) *Power to*	**Who does what?** • What do women, men and people of other genders do (tasks/chores responsibilities)? • Where do they carry out these activities (in the house, community, workplace or an institution)? • How often do they do them (daily and seasonal patterns)? How long do they spend? • Has anything changed since the disaster/conflict/crisis? *Remember: productive, reproductive and community roles*
Access to and control over resources *Power to* *Power over* *Power with*	**Who has what? Who can use what and who has control over it?** • What assets, resources and opportunities do women, men and people of other genders have access to? • Who has control over these? • Who receives an income (inside and outside the household)? Who can decide what to do with the money? • Who can inherit land or property and who decides on this? • How are budgets allocated and spent? – at household level? – at community level? • Who is allocated public resources? Who receives these resources? – at household level (such as social pensions, benefits, services, humanitarian assistance)? – at community level (such as budget allocation and expenditure on services and infrastructure, support during or after a disaster/conflict/crisis)? • Who has social capital (such as social networks and support networks)? • Has this changed since the disaster/conflict/crisis?
Bodily autonomy, violence and safety *Power over* *Power to* *Power within*	**How widespread is violence and what is the risk of experiencing it?** • Has access to employment outside the house increased the risk of abuse or violence at home, at work or in transit to or from the workplace? • What are the occupational health risks (such as during menopause or in relation to a disability)? • What are the risks of abuse or violence for women, men or people of other genders who are dependent on a carer or have lost their legal capacity? • What protection risks are there during a disaster/conflict/crisis, including risk of gender-based violence? • Have risks and power dynamics changed since the disaster/conflict/crisis?

HelpAge International

Handout 6b
Gender analysis (completed exercise) *continued*

Areas of enquiry	Questions
Knowledge and information *Power over* *Power to* *Power within* *Power with*	**Who has information about what? Who do they share this information with?** • Who knows about government policies and programmes and how to access them (such as social protection)? • Who knows about institutional policies and programmes (such as equal opportunities in recruitment, wage parity, sexual harassment prevention, complaints and grievance mechanisms)? Are these shared with and explained to everyone? • Who knows how to access services (such as health, income, legal, gender-based violence support services, humanitarian assistance)? • Who is a member of, or has access to social or economic networks, unions or humanitarian committees to share information and knowledge and have mutual support? • How does this information give someone power and status? • Has the place for obtaining information and sharing knowledge changed since the disaster/conflict/crisis?
Aspiration and participation *Power to* *Power within* *Power with*	**Who participates at what level and for what purpose?** • Do all women, men and people of other genders, have the same choice of activities (such as training or volunteer opportunities)? • Do women, men and people of other genders have the freedom to access public spaces and participate in project activities? Can they make decisions and express their opinions? • Are women, men and people of other genders supported to participate (such as through safe spaces for everyone to speak, accessible and inclusive venues, consideration of time constraints or caring responsibilities, adaptation of learning styles, measures to build self-confidence)? • Who participates in decision-making at household and community levels? What kind of decisions (level of importance and influence, opportunities for planning projects)? • Have decision-making structures changed since the disaster/conflict/crisis?
Duty bearers and institutions *Power over* *Power to* *Power with*	**Who benefits?** • What are the laws, policies, norms and structural constraints and who benefits from the status quo? • How do religious or political groups set rules and policies or laws that maintain situations for their own benefit rather than for everyone (such as division of labour)? • Has this changed since the disaster/conflict/crisis? Have policies been revised, updated or abandoned? • How are organisations responding to gender issues (such as collecting and using data broken down by sex, age and disability, staff training, recruitment, resourcing, policies, information management, communication)? • Who benefits at individual, family, community and institutional levels? • Is the distribution of benefits different from before the disaster/conflict/crisis?

HelpAge
International

4-power framework

Power is the ability to create or resist change. It can be held by individuals or groups.

Power held by individuals relates to their autonomy, which can be less visible.

Power held by groups relates to set structures and rules in any given context.

There are four types of power:

Power over This is domination, often a negative use of "power over" other people. It can be exploitative and repressive.
It can be used to control resources and opportunities for influencing decisions. However, "power over" does not have to be negative. It can just mean having access to and control of financial, physical and knowledge-based assets. It can also mean having control over other people to protect their interests.

Power to This means being able to choose what to do and being able to do it. It includes resisting or creating change.
It means being able to make decisions (within the household, community or more broadly) and to shape one's life.

Power within This refers to the knowledge, capability, self-esteem and self-belief of any individual to enable them to bring about change in their life. It promotes personal dignity. It is often influenced by cultural or religious norms.

Power with This is the ability of people with different interests to find common ground and act collectively, based on a sense of solidarity and mutual support, to build collective strength.

Source: VeneKlasen L, and Miller V, 'Power and empowerment', *PLA Notes,* 43: 39–41, 2002, and Comic Relief Maanda Initiative, *A framework for women and girls' empowerment: Guidance for Maanda applicants and grantees,* Comic Relief, 2014

HelpAge
International

Ladder of participation

Set own rules — Level 4 **Ownership and control**

Make decisions

Influence decisions — Level 3 **Decision making**

Listened to

Speak up — Level 2 **Active participation**

Attend meetings

Allowed to join (others' rules) — Level 1 **Token participation**

Excluded — Level 0 **No participation**

HelpAge International

Interviewing (livelihood)

Interviewer

Scenario: Livelihood project in rural Tanzania

Your organisation has decided to develop a livelihood project for the most marginalised and poorest inhabitants of a remote rural area of Tanzania. Before developing the proposal, you are conducting a situational analysis that includes gathering data from the community using individual interviews. Your organisation is aware that there are major issues over land ownership.

You come across a 70-year-old woman who lives on the edge of the village with her 10-year-old granddaughter whose parents have both died. You are conducting a semi-structured interview with the woman to find out why she has no access to land for farming.

Key points

- The interview should be more like a conversation than a survey. However, you should still follow a basic script. In this exercise, it is up to you to come up with a minimum of four points you need answers to. Write your questions down in bullet points before starting the interview.

- Make sure you address issues of confidentiality and ethical concerns, such as gaining the interviewee's consent and conducting the interview in private.

Interviewee

Scenario: Livelihood project in rural Tanzania

An organisation has decided to develop a livelihood project for the most marginalised and poorest inhabitants of a remote rural area of Tanzania. Before developing the proposal, a situational analysis will be carried out. You are asked to be interviewed as part of this.

You are a 70-year-old woman who has lost her husband and son, and whose other children left the community a long time ago. You are very poor. You live on the edge of the village with your 10-year-old granddaughter whose parents have both died. You only receive a small social pension. You need to generate an income.

Key points

You are being interviewed. Your role is to be one or more of the following:

- Shy and lacking assertiveness

- Chatty but not about the issues your interviewer wants to focus on

- Defensive or aggressive

- A bit confused

Feel free to choose your character's personality.

HelpAge
International

Observer

Scenario: Livelihood project in rural Tanzania

An organisation has decided to develop a livelihood project for the most marginalised and poorest inhabitants of a remote rural area of Tanzania. Before developing the proposal, you are asked to participate in a situational analysis and give your individual insight during an interview.

A 70-year-old woman who has lost her husband and son is being interviewed. Her other children left the community a long time ago. She is very poor. She lives on the edge of the village with her 10-year-old granddaughter whose parents have both died. She only receives a small social pension. She needs to generate an income.

Key points

Observe carefully:

- How does the interviewer approach the women and explain the purpose and process of the interview?

- What sort of language does the interviewer use to explain the purpose and process of the interview and ask questions?

- How does the interviewer's body language encourage or discourage a conversation?

- How does the interviewer react to the woman's responses, especially when she is not answering the questions?

- How would you describe the dynamics between the two?

- How would you describe the atmosphere of the interview?

HelpAge
International

Interviewing (refugee camp)

Interviewer

Scenario: Safety and access to services in a refugee camp

Civil war has broken out in a South-East Asian country. Many people have fled to refugee camps across the border. Because the conflict was unexpected, preparedness has been minimal. A team of experts has been sent to the camp to find out whether services are accessible to everyone there, whatever their age, gender, ethnicity or disability status. You are conducting a semi-structured interview with an older woman who has lost her home and is there on her own.

Key points

- The interview should be more like a conversation than a survey. However, you should still follow a basic script so that you cover the same topics in all the interviews you carry out. In this exercise, it is up to you to come up with a minimum of four points you need answers to. Write your questions down in bullet points before starting the interview.

- Make sure you address issues of confidentiality and ethical concerns, such as gaining the interviewee's consent and conducting the interview in private.

- Remember the interviewee may be traumatised.

Interviewee

Scenario: Safety and access to services in a refugee camp

Civil war has broken out in a South-East Asian country. Many people have fled to refugee camps across the border. Because the conflict was unexpected, preparedness has been minimal. A team of experts has been sent to the camp to find out whether services are accessible to everyone there, whatever their age, gender, ethnicity or disability status. You are being interviewed as part of this assessment.

You are an older woman who has lost her home and way of life. Your children moved away years ago. However, they have probably been also been displaced by the conflict. You have no means of contacting them. You are worried about them and miss them very much. You are unhappy about being in a strange country.

Key points

You are being interviewed. Your role is to be one or more of the following:

- Shy and unassertive

- Chatty but not about the issues your interviewer wants to focus on

- Defensive or aggressive

- A bit confused

Feel free to choose your character's personality.

HelpAge
International

Observer

Scenario: Safety and access to services in a refugee camp

Civil war has broken out in a South-East Asian country. Many people have fled to refugee camps across the border. Because the conflict was unexpected, preparedness has been minimal. A team of experts has been sent to the camp to find out whether services are accessible to everyone there, whatever their age, gender, ethnicity or disability status. A semi-structured interview is being conducted with an older woman who has lost her home and is on her own.

Key points

Observe carefully:

- How does the interviewer approach the woman and explain the purpose and process of the interview?

- What sort of language does the interviewer use to explain the purpose and process of the interview and ask questions?

- How does the interviewer's body language encourage or discourage a conversation?

- How does the interviewer react to the woman's responses, especially when she is not answering the questions?

- How would you describe the dynamics between the two?

- How would you describe the atmosphere of the interview?

HelpAge
International

Active listening guidelines

- **Attend to what the person is saying.** Show you are listening. Inform them you will be taking notes. Provide verbal and non-verbal feedback, such as making eye contact, nodding and smiling.

- **Repeat or paraphrase what the person is telling you to encourage a fuller response.** For example, a sceptic might say: "I really can't participate in this training." Your answer could be: "So you think you cannot participate in this training? Tell me more."

- **Reflect the feelings and experiences the person is describing.** Pick up cues. For example, say: "So, you are quite upset about this", "You give me the impression that this worries you a lot" or "From what you have been saying, it seems to me that you find yourself in a dilemma. You are sceptical about the content of this training, but you are a little bit curious as well."

- **Summarise the person's feelings and experiences to focus on an issue or ask for confirmation.** For example, you could say: "I understand that you don't want to participate in certain parts of the training, but you would be willing to try the introductory session. Is that correct?"

- **Probe.** Ask questions in a supportive way that encourages the person to provide more information or to clear up any confusion. For example, you could say: "I'm not sure I have understood fully what you said about X" or "Can you say a little more about Y?"

- **Give feedback on the person's ideas or feelings.** Disclose relevant personal information about yourself. For example, you could say: "I understand your reluctance, because I had similar worries before my first training as well."

- **Be supportive.** Show some warmth and caring. For example, you could say: "It sounds as if you have found quite a good solution. We can certainly talk more about this later, if you wish."

- **Stay quiet.** Give the person time to think as well as talk. Be comfortable with silence.

HelpAge International

Issue identification and analysis

Goal and objective setting

Stakeholder mapping

Strategy development

Implementation and monitoring

Evaluation

Involve older people

HelpAge
International

Project cycle

Identification

Design

Implementation and monitoring

Evaluation

Learning

Involve older people

HelpAge
International

Proposal development process

```
┌─────────────────┐
│      Issue      │
│  identification │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│   Situational   │
│     analysis    │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│  Identification │
│     of donor    │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│   Concept note  │
│   development   │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│      Theory     │
│    of change    │
└─────────────────┘
         │
         ▼
┌─────────────────┐
│     Proposal    │
│   development   │
│ including budget│
└─────────────────┘
         │
         ▼
┌─────────────────┐
│     Proposal    │
│  submission to  │
│      donor      │
└─────────────────┘
```

HelpAge
International

Gender action plan

Challenge	Planned actions	Responsible person	Role of gender focal point	Indicators of progress	Timeframe

HelpAge International

Challenge	Planned actions	Responsible person	Role of gender focal point	Indicators of progress	Timeframe

HelpAge
International

Case study: Post-disaster

Case study

Scenario

During recent heavy rainfalls in Sri Lanka, a number of villages were buried under mudslides and flooded by overflowing rivers. Thousands of people were evacuated to the closest safe town where an evacuation centre was set up.

Collaboration between local authorities and civil society organisations, including older people's associations and disabled people's organisations, led to the appointment of a management committee and task force to run the centre and ensure the wellbeing of the evacuees. The committee was made up of members of various women's groups, including older women and women with disabilities. Their responsibilities included finding family members who had become separated from each other, distributing food and clothes, running activities and lessons for children, providing psychosocial support, and arranging health checks and treatment.

Another committee, made up of male members of various community groups, was established to support the rescue efforts. The work included visiting the affected areas, talking to village and religious leaders, local authorities and affected household heads to assess the need for assistance, and plan how to help communities rebuild their lives and minimise the long-term effects of the disaster.

Discuss the following questions. Try to apply the elements of gender analysis (areas of enquiry, participation, powers, gender-sensitive/gender-transformative):

- Which elements do you have information about? What does this tell you?

- What elements do you require further information on?

- What further questions do you need to ask to determine whether barriers to inclusion (related to gender, age and disability) have been considered?

HelpAge
International

Case study: Water, sanitation and hygiene

Case study

Scenario

Parts of East Africa have been increasingly suffering from extreme weather conditions, ranging from heavy rainfall outside the usual rainy seasons to extreme drought. This has led to rural communities being cut off at times from services in the nearest towns. They have suffered poor crop yields and higher incidences of water-borne diseases. Many people, especially young adults, have migrated to urban areas in the hope of finding work and accessing better services. Older people and people with disabilities have usually stayed behind, often looking after young children.

An international organisation specialising in improving access to safe water and sanitation has been developing new programmes of work to support communities that have never been prioritised for improved water, sanitation and hygiene facilities (WASH). This organisation's approach is that:

- Access to improved WASH facilities will be demand-led and decided by a committee.

- Part of the cost of the work (20 per cent) will be contributed by the communities. Community members must also commit to maintaining the WASH facilities. They will be trained how do this as part of the project.

A committee has been set up to decide what facilities to provide, where to locate them, which households should receive piped water, where to install pumps or wells, and how to finance the construction work.

The committee is made up of an equal number of women and men. At its last meeting, the committee decided that those who could not afford to contribute financially to the cost of installing the new facilities could pay through work. Women could look after the labourers' children and prepare food for the labourers. The committee also decided that piped water would be available to certain members of the community and that a covered well would be built in the middle of the village based on a mapping of where those with mobility issues were located. The committee has selected three unemployed, young men to be trained to maintain the new facilities.

Discuss the following questions. Try to apply the elements of gender analysis (areas of enquiry, participation, powers, gender-sensitive/gender-transformative):

- Which elements do you have information about? What does this tell you?

- What elements do you require further information on?

- What further questions do you need to ask to determine whether barriers to inclusion (related to gender, age and disability) have been considered?

HelpAge
International

Case study: Funding proposal

Scenario

A funding proposal is being prepared for a project to:

- Improve the psychosocial wellbeing of 3,200 older refugees and their dependants.

- Support the rehabilitation of 2,400 older refugees and their dependants.

Analysis

HelpAge surveyed the needs of over 1,000 older refugees (60 per cent women, 40 per cent men). Of those interviewed, 78 per cent exhibited signs of distress ranging from emotional instability to cognitive, behavioural and relationship problems. Also, 50 per cent complained of a lack of livelihood opportunities and 60 per cent identified income as a priority need.

Older women, in particular, often shoulder household responsibilities and care for children (60 per cent of the women in survey). At the same time, many suffer from chronic conditions and mobility problems. The combination of their responsibilities and vulnerabilities compound the psychological strain of living in the camp.

Response

HelpAge proposes to:

- Establish 60 older people's clubs.

- Train 500 older people as peer counsellors across three camps to recognise the symptoms of trauma and stress and learn how to alleviate these through talking therapies.

- Support the 500 peer counsellors to offer individual and group counselling to 3,200 older refugees through home visits and organised sessions in existing meeting spaces in the camps.

- Organise a variety of cultural and sports activities in the camps to relieve stress and strengthen cohesion and trust between different ethnic groups within the camps.

- Provide start-up capital to members of older people's clubs to set up small businesses, following market assessments and consultation with other interested parties.

- Provide tailored training to older entrepreneurs in their chosen business activity, as well as general business training.

- Arrange for project staff to mentor older entrepreneurs throughout the three-year project through regular visits.

Discuss the following questions. Try to apply the elements of gender analysis (areas of enquiry, participation, powers, gender-sensitive/gender-transformative):

- Which elements do you have information about? What does this tell you?

- What elements do you require further information on?

- What further questions do you need to ask to determine whether barriers to inclusion (related to gender, age and disability) have been considered?

HelpAge
International

Role of facilitator

Positive body language

Know participants' background

Being ready and prepared

Presenting yourself

Prepare venue

Listening skills

Role of facilitator

Time management

Training methods

Your style

Balance knowledge with experience

Sense of humour

Receive feedback without being defensive

HelpAge
International
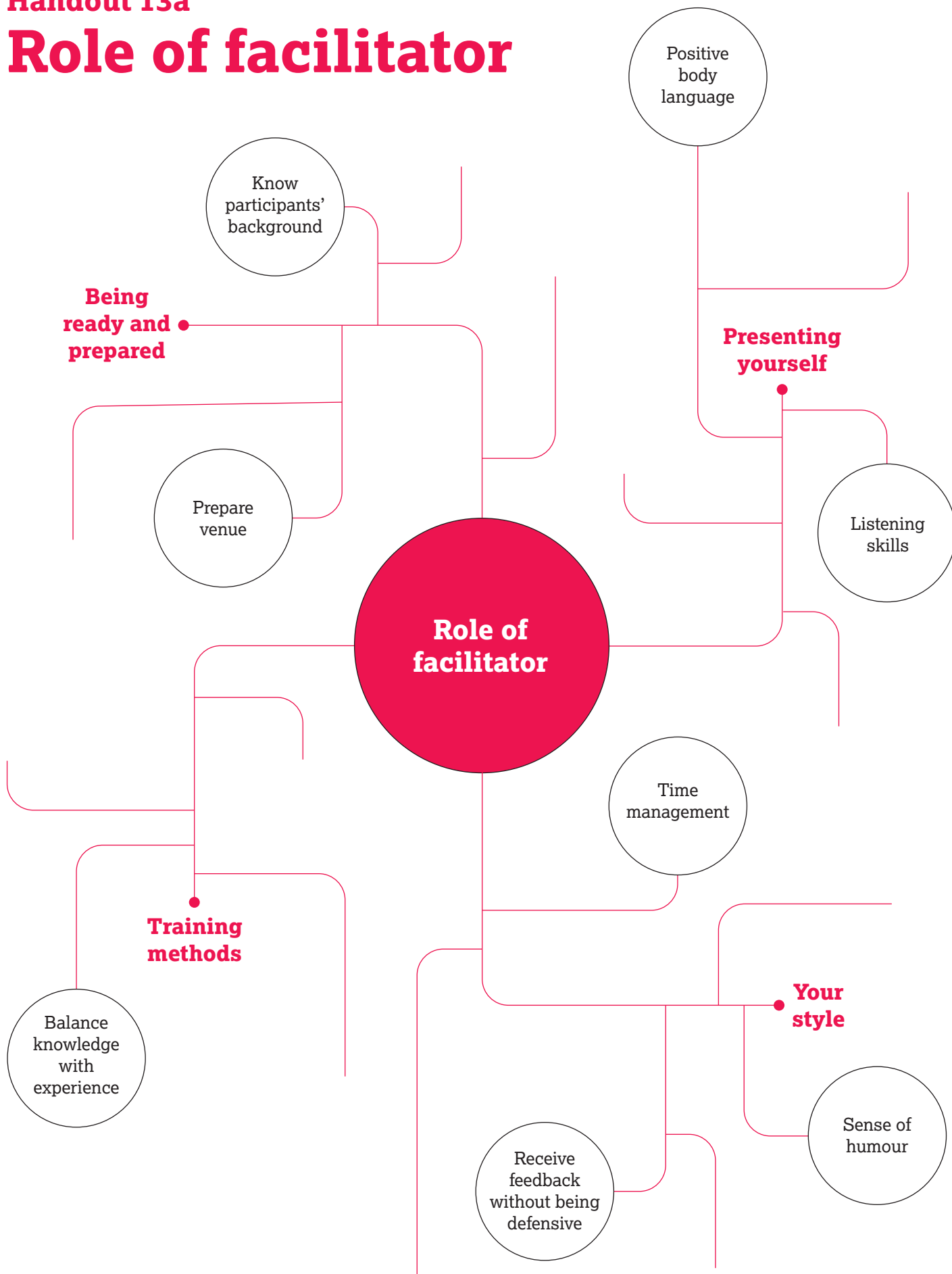
Challenging situations for facilitation (scenario 1)

- A older man is repeatedly complaining that everything is about women and asking why men are not given the same attention.

- A older woman is complaining that you are undermining women's treasured status as home-makers and that you are trying to turn them into men.

- An older woman is trying to speak but is constantly being interrupted by male participants.

- A participant is challenging the accuracy or value of what you are presenting.

HelpAge
International

Challenging situations for facilitation (scenario 2)

- A participant is complaining that it is a waste of time to talk about older people when we should be concerned about children and young people.

- During a discussion, several people are talking at once.

- Participants are falling asleep, fiddling with their phones or computers, or talking to each other while you are presenting something.

HelpAge
International

Dealing with challenging participants

Role	Why it happens	What to do
Heckler	Probably good-natured most of the time but distracted by their job or personal problems.	• Keep your temper under control. • Honestly agree with one idea, then move on to something else. • If the person states a false fact, throw it to the group to turn down. • Talk privately with the person as a last resort to find out what is bothering them.
Rambler	One idea leads to another and takes this person miles away from their original point.	• When the person pauses for breath, thank them, refocus the group's attention and move on. • In a friendly manner, indicate that "we are a little off the subject". • As a last resort, use your training schedule as an excuse. • Glance at your watch and say: "time is limited".
Ready answer	Really wants to help, but makes it difficult by keeping others from participating.	• Cut the person off tactfully by questioning other participants. • Suggest that "we put others to work". • Ask the person to summarise. This will keep them attentive and capitalise on their enthusiasm.
Conversationalist	Chatter is usually about personal things but may be related to the topic.	• Call the person by name and ask an easy question. • Call the person by name, repeat the last opinion expressed, and ask their opinion of it. • Include them in the discussion.
Clash of personalities	Two or more individuals clash, dividing the group into factions and endangering the success of the session.	• Try to highlight areas of agreement between the two participants. Draw attention to the objective of the session. • Direct a question on the topic to someone not involved in the disagreement. • As a last resort, frankly state that personalities should be left out of the discussion.

HelpAge
International

Handout 13d
Dealing with challenging participants *continued*

Role	Why it happens	What to do
Wrong track	Brings up ideas that are obviously incorrect.	- Say: "that's one way of looking at it" and tactfully make any corrections. - Say: "I see your point, but can we reconcile that with our current situation?" - Handle the situation tactfully, since you will be contradicting the person. *Remember, all members of the group will hear how you respond to each individual. You can encourage or discourage participation by the way you communicate.*
Quiet one	- Bored - Indifferent - Timid - Superior	- Gain their interest by asking their opinion. - Question the person next to them. Then ask the quiet one to comment on the view expressed. - Compliment the person the first time they contribute. Be sincere. - Show respect for the person's experience, then ask for their ideas.
Mule	Does not see the other side. Supports their own viewpoint no matter what.	- Ask other members of the group to comment on the person's ideas. They may add another perspective and help the person see differently. - Remind the person that time is short. Suggest that they accept the majority view. - Say you are willing to talk to the person later. Then follow up.
Talker	- Highly motivated - Show-off - Well informed - Just plain talkative	- Slow the person down by asking them some difficult questions. - Say: "that's an interesting point. Now let's see what the others think of it." - Draw on the person's knowledge and relay this to the group yourself. *In general, for any over-talkative person, you should highlight the need for everyone to have the chance to participate.*
Griper	Has a pet peeve, complains for the sake of it, or has a legitimate complaint.	- Point out that the aim is to work as efficiently and cooperatively as possible under the present circumstances. - Tell the person you will discuss their problem with them privately at a later time. - Ask another member of the group to respond to the person's complaint.

Source: Carr D A, 'How to Facilitate', *American Society for Training and Development,* Issue 9406, June 1994

HelpAge
International

Training evaluation form

1. Please rate the logistics and preparation for the training on a scale of 1 (very poor) to 5 (excellent)

	1	2	3	4	5
Communication prior to the training					
Communication during the training					
Logistics and organisation of the training					
Food					
Accommodation (if relevant)					
Accessibility of venue					
Interpretation (if relevant)					

2. Please rate the facilitation of the training on a scale of 1 (very poor) to 5 (excellent)

	1	2	3	4	5
Clarity of presentations and explanations					
Support to participants and confidence-building					
Choice of exercises and facilitation methods and tools					
Time-keeping and attention to energy levels					
Accessibility of sessions					

3. Please rate the content of the training on a scale of 1 (very poor) to 5 (excellent)

	1	2	3	4	5
In terms of its relevance to your work and the knowledge and skills you have gained					

Comments

....

....

....

....

....

HelpAge
International

Handout 14
Training evaluation form *continued*

4. Which sessions did you find most useful?

Comments

....
....
....
....
....
....

5. Which sessions did you find least useful?

Comments

....
....
....
....
....
....

6. Which topics might you need more help or practice with to become confident about them?

Comments

....
....
....
....
....
....

HelpAge International

Handout 14
Training evaluation form *continued*

7. Overall, did the training meet your expectations?

☐ Yes, completely ☐ Partially ☐ No, not at all

Comments

....

....

....

....

....

....

8. Was anything missing that should have been included in the training?

Comments

....

....

....

....

....

....

9. Have you any other comments or suggestions, including activities you think would be useful for future training?

Comments

....

....

....

....

....

....

Thank you for your feedback.

HelpAge
International

Gender equality learning pack

Part of the HelpAge International
Gender equality training toolkit

HelpAge
International

Gender equality learning pack

Contents

Introduction

Gender equality means equal rights, responsibilities, opportunities and treatment of women, men and people of other genders. It is not about one group gaining more power to the detriment of another, rather it is about ensuring that all persons are treated with dignity and can develop their full potential. HelpAge International's position is that all older people should be recognised and respected as individuals with equal dignity, to be embraced equally and treated fairly and without discrimination, whatever their diverse and overlapping identities, values, beliefs or needs.

Our 2030 Strategy commits us to achieving impact on the wellbeing, dignity and voice of older people in their diversity. We will leave people behind in this effort if our work is gender blind. HelpAge will ensure all are included, through the promotion of gender equality in our work, particularly towards the empowerment of older women and the transformation of currently unequal gender relations between women and men. We will also seek better evidence so we can better understand and address specific gendered inequalities that older men may face. In addition, we will remain sensitive to gender identities not expressed within binary categories.

In taking these commitments forward, we recognise that gender affects us all and that equality between genders benefits all – individuals, families and communities – and is therefore a population-wide issue. For instance, older women make substantial economic and social contributions to society. They also represent an important and growing political constituency in both developed and developing countries. Recognising and supporting their full participation will benefit the health and well-being of individuals, families, communities and nations.

Gender should therefore not be treated as a separate issue, but rather as a "lens" through which we view and plan all our work. Gender-sensitive work therefore goes beyond targeting equal numbers of male and female participants – it is about redressing imbalances and tailoring activities to the specific needs and interests of women, men and people of other genders.

Consideration of gender in our work can help us identify whether our approach to gender helps or hinders equal opportunities and outcomes for women and men across each of our Strategy 2030 focus areas.[1] While it is often women who have less access to resources, power and opportunities, men's lives may also be adversely affected by their gender roles. Equality does not mean that women and men become the same, rather that women's and men's rights, responsibilities and opportunities do not depend on whether they are born, or identify as, male, female or other.

How gender and ageing intersect

- Gender roles can change with age. Older people often fulfil roles that are not typical of their gender, such as older men caring for their grandchildren, and older women heading households.

- Gender-based discrimination, particularly in later life, can be hidden by a lack of sex- and age- disaggregated data. This is a major constraint to developing gender-responsive policies and programmes.

- Gender-based discrimination can accumulate over a person's lifetime and be exacerbated in older age.

- Older women can face double discrimination based on both their age and gender.

- Older men can experience challenges to masculinity that can leave them feeling isolated.

- Older women and men, and older people of other genders are at risk of gender-based violence. It is about abuse of power.

- Understanding our changing gender identities and power relations throughout life is crucial to understanding our experience of ageing.

1. Income security; Healthy ageing; Inclusive humanitarian action; Freedom from violence, abuse and neglect; Lifelong learning; A society for all ages; Age-inclusive systems; A stand against ageism; Technology embraced; A movement for change

Understanding sex and gender

HelpAge has up to now adopted language that reflects a binary understanding of gender in our work on gender equality and gender mainstreaming – that is, recognising just two genders, male and female. However, we recognise that understanding of sex, gender and identity is evolving, and that individuals or groups who do not identify within established gender or social norms often face stigma, discrimination or social exclusion.

In keeping with our organisational values and commitment to gender equality, we recognise that our own language, understanding and capabilities in relation to sex and gender must evolve beyond a binary understanding. This will be a learning process for the organisation for the duration of the 2030 Strategy, and will be informed and guided by the lived experience of the older people we work with and human rights principles and standards. This issue will be more fully addressed in future updates of the training toolkit.

Gender mainstreaming and targeting

In line with our strategy on gender equality, we will continue to review and adapt our "twin-track" approach of gender "mainstreaming" and gender "targeting" to ensure that our work is inclusive and respectful of all older people, whatever their expressed gender identity.

Gender mainstreaming means that gender is considered in everything we do. The starting point for this "gender sensitivity" is gender analysis, which enables us to identify and act to address gender-based inequalities and power imbalances.

Targeted approaches generally seek "gender-transformative" change by promoting older women's voice and rights in order to create gender equality in older people's roles, status, access to and control over resources and influence. Further guidance on these approaches is available in Module 1, Section 3 of this Learning pack and in HelpAge's Minimum standards for gender mainstreaming (see the Annex).

About this Learning pack

This Learning pack is designed for HelpAge gender focal points, staff, network members and partners to use for complementary distance learning. It is part of a Gender equality training toolkit that also includes a Training manual and a set of Handouts.

It is designed for you to:

- reflect on your perceptions of gender and other identities, along the life course and particularly in older age, and challenge unconscious bias

- understand discrimination based on bias towards gender and other identities, particularly with regard to older people

- develop an understanding of why gender analysis is important in all development and humanitarian interventions

- learn how to carry out a gender analysis.

The Learning pack provides an Annex listing further reading to support learning before, after or alongside the training. It includes a Glossary of terms, more in-depth discussion of the topics covered in the Training manual, and quizzes to check what you have learnt.

Module 1 discusses the difference between sex and gender. It looks at gender roles and needs, and compares gender-sensitive and gender-transformative approaches. Module 2 looks at perceptions and discrimination, and barriers to inclusion. Module 3 explains what gender analysis and mainstreaming mean for projects, advocacy and organisations. Module 4 helps you apply a gender analysis in different contexts.

Module 1
Sex and gender

Section 1: Sex, gender and sexual orientation

Learning objectives: Understand the difference between sex, gender and sexual orientation. Understand perceptions and stereotypes about women and men.

Difference between sex, gender and sexual orientation

Sex refers to physical and biological attributes such as sex chromosomes, hormones and reproductive organs, which are used at birth to identify individuals as female or male. There are some people born with attributes that are neither exclusively male nor female, a category known as intersex.

Gender refers to the social differences ascribed to women and men, which are often central to the way in which people define themselves and are defined by others. Gender roles are learned, changeable over time, and variable within and between cultures. Gender often defines the duties, responsibilities, constraints, opportunities and privileges of women, men, girls, and boys in any context.

Sex	Gender
Sex refers to biological aspects of an individual and the differences between males and females as determined by their chromosomal, anatomical, reproductive, and hormonal characteristics.	Gender encompasses the economic, political, legal, psychological and socio-cultural attributes, constraints and opportunities associated with being male or female.
Sex is determined at birth. It is universal and unchangeable without medical intervention.	It is socially constructed, learnt through socialisation and changes according to time and context.
Sex: • is biological • is unchangeable (without medical intervention) • is universal • physical characteristics • reproductive characteristics	Gender: • is social and cultural • is externally and internally constructed • is learnt • is changeable • is different from one society to another

Knowledge box

Intersex

Globally, up to 1.7 per cent of people have intersex traits,[2] that is, any of several variations of sex-defining characteristics such as chromosomes, sex organs, or sex hormones. They, therefore, do not fit strict definitions of male or female.

Intersex people are often stigmatised from birth. This may include being abandoned or killed. Globally, doctors and parents usually decide the sex of an intersex child through hormonal and/or surgical interventions. This may cause difficulties for a person whose gender is assigned accordingly but does not match how they feel.

2. https://www.unfe.org/wp-content/uploads/2017/05/UNFE-Intersex.pdf

As a social construct, what gender means varies across cultures. It is open to change over time. Because of this, gender roles and relations should not be assumed but analysed.

Gender reflects the norms of a society that explain what behaviours are appropriate for women, men and people of other genders: what they are expected to do, what they are expected to be good at, how they should look (clothes, hairstyle, etc), how they should relate to each other.
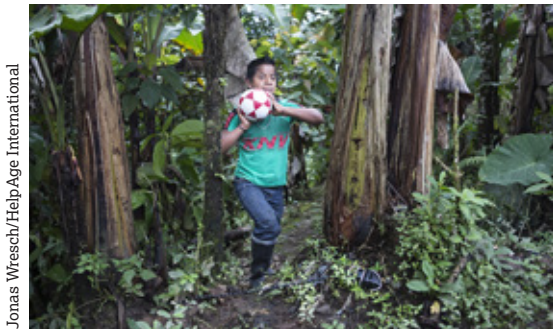
Roles and responsibilities are generally assigned to women or men, for example, through legislation or religious interpretation. Children learn about social norms for girls and boys, women and men. The roles and responsibilities of women and girls, and men and boys, have different values. This leads to gender inequality.

The terms "masculinity" and "femininity" refer to traits or characteristics typically associated with being male or female.

Masculinity	Femininity
• Physical strength	• Weakness
• Intelligence	• Beauty
• Activeness	• Passiveness
• Aggression	• Sensitive
• Security	• Insecurity
• Rational	• Irrational
• Ambition	• Caring
• Confidence	• Nurturing
• Decisive	• Kindness
• Strategic	• Emotional

Gender is not always strictly masculine or feminine. We all have traits and qualities that may be seen as "typical" of the other gender. Men can be very caring, sensitive and emotional, and women can be tough, outgoing and ambitious. While such attributes are often seen as negative because they are not in keeping with gender norms, they do not make us less of a woman or man but attest to the diversity of human beings. It is important to understand that the concept of gender evolves and changes over time.

Gender identity is regarded as a person's deeply felt internal and individual experience of gender, which may or may not correspond with their sex assigned at birth. Gender is increasingly understood as not binary (woman/man) but on a spectrum. Growing numbers of people are identifying as somewhere along the spectrum, from being a woman or man, to being non-gendered. Gender identity is different from sexual orientation.

A girl may identify as a boy, and a man may identify as a woman. They may dress and behave according to the gender they identify with. People who have a gender identity that does not correspond with their sex assigned at birth may describe themselves as transgender. Transgender people may identify as male or female, or they may feel that neither label fits them.

Some people have a gender that blends elements of being a woman or a man, or a gender that is neither female nor male. Some people do not identify with any gender. Some people's gender changes over time. People whose gender is neither female nor male use different terms to describe themselves, with non-binary being one of the most common. Another term is queer. None of these terms means exactly the same thing. They are all used to describe an experience of gender that is not simply female or male.

Why non-binary?

Some societies recognise just two genders, woman and man. The idea that there are only two genders is sometimes called the "gender binary" because binary means having two parts. Therefore, "non-binary" is one term people use to describe genders that do not fall into only one of these two categories, woman or man.

Knowledge box

Some cultures have historically recognised a third gender. For example, the Fa'afafines in Samoa and the Hijra in South Asia are accepted as transgender and intersex people. However, in many countries, the social and legal acceptance of people of non-binary genders is still being fought for.

Cherrie Mio Rhodes/Flickr

The Divas of Samoa, Fa'afafine show.

Nick Kenrick/Flickr

Hijras in Bari Basti, Pushkar, Rajasthan.

Case study

Third gender

In Samoa, South Pacific, the Fa'afafine people do not fit into the gender models of male and female. Fa'afafines (literally "the manner of woman") are people who are biologically male but raised as and identify as female. This third gender has been culturally accepted for generations and accounts for approximately 1–5 per cent of Samoa's population.

Source: https://www.bbc.co.uk/news/world-asia-37227803

Sexual orientation is a term used to describe whether a person feels attracted sexually and/or romantically to people of another sex, the same sex or both. People who are attracted to the opposite sex are heterosexual. Men attracted to other men are gay (or homosexual). Women attracted to other women are lesbian (or homosexual). Bisexual refers to a person of any gender who is attracted to more than one gender.

Social expectations linked to gender affect how women and men behave. This includes their sexual behaviours, attitudes and feelings. Pressure to conform to society's norms can have negative consequences for both women and men.

Homosexuality is still illegal in many countries. In many others it is still severely frowned upon. People who identify as having a gender that is different from their sex often face discrimination and violence, including from family and friends.

People who identify as having a gender that is different from their sex, or who are attracted to people of their own sex, are described as members of the LGBTQI+ community (lesbian, gay, bisexual, transgender, queer, intersex and plus, which includes any orientation not represented by these letters). They may organise themselves to influence government and society to protect their human rights and promote their opportunities and dignity. For more information on LGBTQI+ resources please refer to the Annex.

Sexual orientation and gender identity are not a choice. They are innate characteristics. Being homosexual or having a different gender identity is not a disease. They are not the result of any external influence. People cannot be "cured" or "unlearn" their sexual orientation or gender identity.

- Gender refers to relationships between women and men. These relationships are constructed by society. They are based on people's expectations of women and men and their perceived value in society.

- This means that there is a hierarchy of characteristics associated with women and men, and a hierarchy of roles and responsibilities. These hierarchies affect how women and men are valued. They lead to unequal power relationships between women and men.

- However, the roles of women and men and the power relationships between them can change over time. This has happened before and is likely to continue happening. There is a continued opportunity to promote gender equality.

- Most gender roles are context-specific. This means they largely depend on where people live, their cultural background, age, socio-economic status and so on.

- Individual people experience life differently at different ages and life stages. People in different age groups (younger children, adolescents, younger adults, older adults etc) and with different marital status (unmarried, married, widowed, separated, divorced, etc) experience gender and power issues differently.

- Gender relations are reinforced by institutional systems such as laws and religious doctrines that reflect the values attached by society to the roles of women and men.

Section 2: Gender roles and needs

Learning objectives: Understand gender roles and responsibilities and their link with values and power relations.

What are the gender roles?

Gender roles are commonly divided into productive, reproductive and community roles.

Productive roles are activities carried out to secure goods or services for sale to enable people to survive. They include employment, farming and trading.

Depending on the socio-cultural context, women and men may carry out preferred or assigned types of productive activities with different levels of responsibilities and pay. For example, men often hold higher management positions, such as school head, director of a bank or business, responsibility for animals with a higher value than animals looked after by women. Women often have lower-ranked work as assistants, carers, keeping small animals or running market stalls. Position and pay reflect status. In most countries, even if women do the same work as men, they are still paid less than men.

Women work longer than men

Caring responsibilities for children, older people and sick people, as well as household duties, are mainly borne by women. Globally, women spend two to ten more time a day of unpaid care than men.[3] Many older women are denied access to the formal labour market and work as unpaid carers of children and other family members.[4]

Mayur Paul/HelpAge International

3. https://www.oecd.org/dev/development-gender/Unpaid_care_work.pdf

4. https://www.helpage.org/global-agewatch/reports/global-agewatch-index-2015-insight-report-summary-and-methodology

Reproductive roles are activities that keep families alive and well. They include childbearing, caring for family members and managing the home (such as fetching water and firewood). Reproductive roles are often manual, time-consuming and unpaid.

Community roles are activities that promote community cohesion. They include organising social events such as ceremonies and celebrations, arranging community improvements and serving on committees. Women's community roles are often an extension of their reproductive roles of mobilising, caring and providing, performed on a voluntary, unpaid basis. Men's community roles are often political and include decision-making. They are more often paid and associated with status and power.

Because men are usually considered to be single-minded and able to focus on their productive role of providing for the family, they tend to get higher-level jobs, promotions and better pay. Women are often assumed to get distracted by their reproductive roles and therefore are incapable of focusing on strategic decision-making.

⚑ **Remember**

> Because reproductive tasks are unpaid, they are not considered work. A high value is therefore not attached to the person performing these tasks. Since they are usually performed by women, women are often undervalued and seen as less capable and less important than men, even though they work long hours and multi-task to fulfil their responsibilities.

Section 3: Gender-sensitive and gender-transformative approaches

Learning objective: Understand different gender needs.

Practical and strategic gender needs

Because women and men often have different roles, they often have different practical and strategic needs.

Practical needs tend to be immediate and short-term. They relate to things people need to survive in their particular living environment, such as food, housing, healthcare, water and income. Practical needs are met through a combination of productive and reproductive activities, such as providing wells and fetching water, running health centres and caring for sick family members, selling goods at the market to earn money to feed the family and earning an income from employment to meet family expenses. Interventions designed to meet practical needs do not necessarily challenge existing gender roles and norms perpetuating gender inequality.

Men's practical needs are similar to women's, but the activities they carry out to meet their practical needs may be different because of different gender roles.

Strategic needs tend to be long-term. They include legal rights (such as land and inheritance rights), protection from domestic violence, equal pay, and women's control over their bodies. Interventions designed to meet these needs challenge the subordinate role of women in society. They relate to the division of labour (who does what), power and control (who has what and who decides how to use it). Addressing strategic needs means transforming gender relations and promoting gender equality.

Women's strategic needs often reflect the fact that their position in society is inferior to that of men (as legislation and practices generally favour men). However, as meeting women's strategic needs may change gender roles, it may be in men's strategic interest to become more involved in roles that have been performed by women, for example, childcare. A strategic need would then be for paternity leave to enable the man to do some of the childcare and support the mother. It may also be in men's interest to promote equal pay for men and women to ease their burden of being the sole or main breadwinner.

Women's representation

Women's representation in local governments can make a difference. Research on *panchayats* (local councils) in India discovered that the number of drinking water projects in areas with women-led councils was 62 per cent higher than in those with men-led councils. In Norway, a direct causal relationship between the presence of women in municipal councils and childcare coverage was found.[5]

5. https://www.uclg.org/sites/default/files/the_role_of_local_governments_in_promoting_gender_equality_for_sustainability.pdf

Gender approaches

Approaches may be gender-neutral, gender-sensitive or gender-transformative.

Gender-neutral approach

- Some gender and age analysis is done, but used as background information.

- Gender- and age-disaggregated data is presented but not analysed.

- Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are not included.

- Resources are not allocated to activities promoting gender equality.

Gender-sensitive approach

- Gender and age analysis is done.

- Gender is apparent in the language. Gender- and age-disaggregated data is used and analysed.

- Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are included.

- The intervention is more likely to focus on their practical or immediate needs.

Gender-transformative approach

- Both quantitative and qualitative gender and age analysis is done.

- Specific outcomes seek to transform unequal power relations between women, men and people of other genders through changes in roles and status, and redistribution of resources.

- Gender equality is promoted as a major goal.

- The intervention aims to challenge existing norms and attitudes that reinforce gender role stereotypes.

- Gender is built into the response and the causes of inequality are addressed head on.

See the Glossary for definitions of terms used in this Module.

Practical and strategic gender needs

Practical needs	Strategic needs
• Tend to be immediate and short-term • Unique to particular women, men or people of other genders • Relate to the things people need to survive in their particular living environment, such as food, housing, healthcare, water and income • Easily identifiable by women, men or people of other genders • Met through a combination of productive and reproductive activities, such as providing wells and fetching water, running health centres and caring for sick family members, selling goods at the market to earn money to feed the family and earning an income from employment to meet family expenses	• Tend to be long-term • Common to almost all women, men or people of other genders • For women, often relate to their disadvantaged position over the life course, subordination, lack of resources and education, vulnerability to poverty and violence, etc • Basis of disadvantage and potential for change not always identifiable by women, men or people of other genders • Can be addressed by consciousness-raising, increasing self-confidence, education, strengthening movements, political mobilisation • Include legal rights (such as land and inheritance rights), protection from domestic violence, equal pay, and women's control over their bodies. These challenge the subordinate role of women in society. They relate to the division of labour (who does what), power and control (who has what and who decides how to use it)
Addressing practical needs	**Addressing strategic needs**
• Project involves women, men or people of other genders as recipients and perhaps participants • Can improve the condition of women's, men's or people of other genders' lives • Does not alter existing gender roles and relations	• Project involves women, men or people of other genders as agents of change or enables them to become agents of change • Can improve the position of women or people of other genders in society through transformation of unequal power relations
Gender-sensitive approach	**Gender-transformative approach**
• Gender and age analysis is done • Gender is apparent in the language. Gender- and age-disaggregated data is used and analysed • Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are included • The intervention is more likely to focus on their practical or immediate needs	• Both quantitative and qualitative gender and age analysis is done • Specific outcomes seek to transform unequal power relations between women, men and people of other genders through changes in roles and status, and redistribution of resources • Gender equality is promoted as a major goal • The intervention aims to challenge existing norms and attitudes that reinforce gender role stereotypes • Gender is built into the response and the causes of inequality are addressed head on

Exercise: Gender roles and needs

Consider which roles and needs the activities listed in the table relate to. Put a cross in the appropriate spaces. Note that each activity could be associated with more than one role or need.

Activity	Women's role recognised			Gender need met	
	Reproductive	Productive	Community managing	Practical needs	Strategic needs

Training for employment

Training for women					
• cooking for family					
• tailoring for sale					
• masonry/carpentry					
• business management					
Access to credit*					
Allocated to household					
Allocated to women					

*micro-finance institutions or government

Basic services

Introduction of a crèche					
Located in the community					
Located at the mother's workplace					
Located at the father's workplace					
Primary healthcare centre					
Open only in the morning					
Open at different times					
Social benefits by government					
Allocated to household					
Allocated to women					

Community participation

Projects with community participation					
With unpaid women's time					
With paid women's time					

Exercise: Gender roles and needs (completed exercise)

The answers are given below.

| Activity | Women's role recognised | | | Gender need met | |
	Reproductive	Productive	Community managing	Practical needs	Strategic needs

Training for employment

Training for women					
• cooking for family	X			X	
• tailoring for sale		X		X	
• masonry/carpentry		X		X	X
• business management		X			X
Access to credit*					
Allocated to household		X		X	
Allocated to women		X		X	X

*micro-finance institutions or government

Basic services

Introduction of a crèche					
Located in the community	X	X	X	X	
Located at the mother's workplace	X	X		X	
Located at the father's workplace	X	X		X	X
Primary healthcare centre					
Open only in the morning	X			X	
Open at different times	X			X	X
Social benefits by government					
Allocated to household		X		X	
Allocated to women		X		X	X

Community participation

Projects with community participation					
With unpaid women's time			X	X	
With paid women's time		X	X	X	X

Quiz

Try this quiz to check what you have learnt from this module. Answers at the end.

1. There is no difference between sex and gender.

☐ True

☐ False

2. There are only two genders, male and female.

☐ True

☐ False

3. Women give birth to babies and men do not. What accounts for this difference?

☐ Sexual differences

☐ Gender differences

4. In some countries, women are not able to inherit land or property. What is this because of?

☐ Sex

☐ Gender

5. Women's and men's roles can be different. They can vary over time and in different cultures and socio-economic contexts. What accounts for this?

☐ Sex

☐ Gender

6. When a women is doing the laundry for her family, what role is she performing?

☐ Reproductive role

☐ Productive role

☐ Community role

7. Practical needs are usually what?

☐ Short-term

☐ Long-term

8. What can meeting women's practical needs improve?

☐ Women's position in society

☐ The condition of women's lives

9. Addressing women's strategic needs means that women will have more power than men.

☐ True

☐ False

10. Gender-transformative interventions are based on:

☐ Qualitative gender analysis

☐ Quantitative gender analysis

☐ Both

☐ Neither

11. A gender-transformative project only considers women's practical needs and includes interventions that make it easier for them to fulfil their reproductive roles.

☐ True

☐ False

Answers: 1 False; 2 False; 3 Sexual differences; 4 Gender; 5 Gender; 6 Reproductive role; 7 Short-term; 8 Condition; 9 False; 10 Both; 11 False

Module 2
Perceptions and discrimination

Section 1: Stereotyping, prejudice and discrimination

Learning objectives: Understand stereotyping and discrimination based on gender, age and disability, and the impact this has.

⚐ **Remember**

- Gender refers to relationships between women and men. These relationships are constructed by society. They are based on people's expectations of women and men and their perceived value in society.

- This means that there is a hierarchy of characteristics associated with women and men, and a hierarchy of roles and responsibilities. These hierarchies affect how women and men are valued. They lead to unequal power relationships between women and men.

- However, the roles of women and men and the power relations between them can change over time. This has happened before and is likely to continue happening. There is a continued opportunity to promote gender equality.

- Most gender roles are context-specific. This means they largely depend on where people live, their cultural background, age, socio-economic status and so on.

- Individual people experience life differently at different ages and life stages. People in different age groups (children, adolescents, younger adults, older adults, etc) and with different marital status (unmarried, married, widowed, separated, divorced, etc) experience gender and power issues differently.

- Gender relations are reinforced by institutional systems such as laws and religious doctrines that reflect the values attached by society to the roles of women and men.

Stereotypes

We often have ideas about people we do not know by categorising them as members of certain groups. These groups may have specific characteristics or identities such as age, gender, ethnicity, disability, sexual orientation or location. What we think we know about people is often based on stereotypes.

Stereotypes are subjective ideas that are commonly held about how a certain group of people is expected to think and behave. Stereotypes are not necessarily true but are often considered as the truth. For example:

- Men are strong
- Women are emotional
- Older women are useless
- Girls are not as clever as boys
- Boys are rough
- Girls are easily scared
- Older people are stubborn
- Adolescents are only interested in partying
- Gay people are always thinking about sex
- Certain ethnic groups are less intelligent than others
- Men with disabilities are weak
- Older women are witches
- Older people are senile and a burden

Prejudice

Stereotypes manifest as prejudice. Prejudice is also subjective. It refers to our feelings about different groups of people. It is often based on the values that the majority of people in any community or society share, or seem to share. Based on our feelings about these groups, we pass judgment on the way they behave. For example:

- Young people from certain ethnic groups are dangerous and go about in gangs
- Men do not make good carers
- Women are too emotional to be any good at politics
- Menopausal women are too emotional and hormone-led to take on positions of responsibility
- Boys and men should not cry because it makes them look weak
- Disabled people are not able to work
- Older people live in the past and cannot make a useful contribution to society
- Adolescents are rude and lazy and don't want to work
- The idea of persons with disabilities having sex is disgusting
- LGBTQI+ people are sick in the head

All these examples are negative. However, stereotypes and prejudice can be based on positive ideas that may be just as unrealistic and unhelpful. For example:

- Women are good with children
- Persons with disabilities who are good at sports are superhuman
- Doctors are better than ordinary people
- People living in cities are cleverer and more sophisticated than those living in rural areas
- Older people are wise and know what's best

Discrimination

Discrimination refers to behaviour influenced by stereotypes and prejudice. For example:

- Women are paid less than men for doing the same work
- Members of certain ethnic groups are not offered jobs
- LGBTQI+ people are persecuted
- Older women are abandoned by their families
- Women can only do unpaid work in the home
- Children with disabilities are overlooked at school
- Older men cannot get a job or are forced to retire because they are "too old"
- Women are subjected to sexual violence

"I feel being made to retire at 55 is unfair, because I know I can still work… I'm still healthy."

Wasiti, retired teacher, Fiji

Voice

Types of discrimination

There are several types of discrimination:

- **Direct discrimination** is less favourable treatment of one person than another because of a particular characteristic, such as age, gender, ethnicity, disability, sexual orientation or location.

- **Indirect discrimination** is apparently neutral treatment of people with a particular characteristic that, in fact, puts them at a disadvantage compared with people who do not have that characteristic.

- **Positive discrimination** means treating someone with a particular characteristic more favourably than people who do not have that characteristic to counteract the effects of discrimination.

The international human rights legal framework includes instruments to combat specific forms of discrimination, including discrimination against indigenous peoples, migrants, minorities, people with disabilities, women, discrimination on racial and religious grounds, and discrimination based on sexual orientation and gender identity.

Human rights belong to everyone whatever their age, gender, ethnicity, disability, sexual orientation or location. Discrimination experienced by older people is based on age as well as other characteristics, including their gender.

Where do these attitudes and behaviour come from? Why do we think in terms of stereotypes? What makes us prejudiced and behave in a discriminatory way?

We are all individuals who live in communities. Society sets common ideas and values. We know they exist, even if they are not talked about or explained. For example, we learn about them when our parents or teachers tell us how to behave. We also know about policies, rules and laws set by institutions.

So, we have three interconnected influences or entities that interact with each other, as the diagram shows:

- Common ideas and values (social norms) influence individuals to act the way they do.

- Institutions and institutional systems are created by individuals. They make policies, so the arrow leads from individual action to institutions.

- Institutions, such as schools and the media, produce or reinforce common ideas and values, so the arrow leads from institutions to common ideas and values.

- Common ideas and values are reflected in legislation and practice set by institutions, so the arrow leads back.

- Individuals behave as policies and practice permit, so the arrow leads back from institutions to individuals.
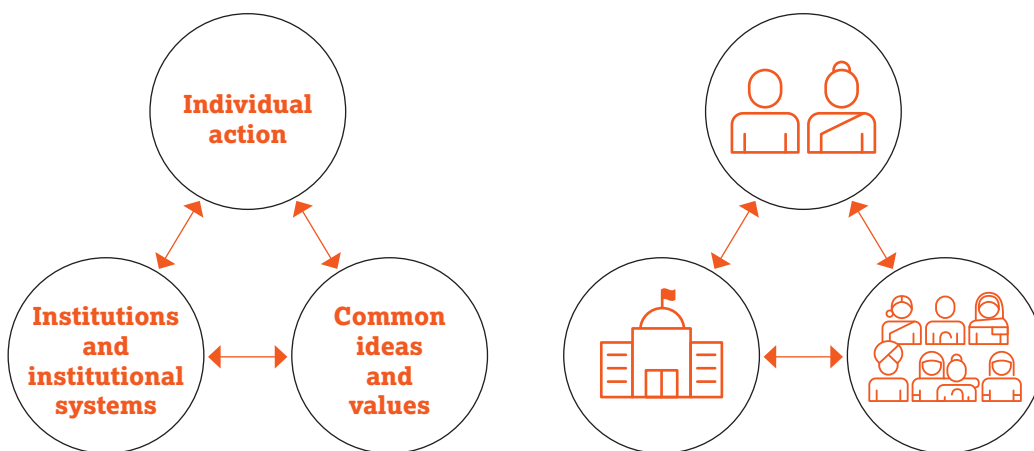
Ageism and sexism

Older women face the accumulated effects of ageism and sexism in several areas of their lives. Older women are more likely than men to encounter ageist attitudes. They may face double discrimination in access to employment, pensions and services. While poverty rates among men and women do not differ much during working life, the difference increases after age 65, and even more so after age 75. Reasons for this are life-long differences in pay and working time, different pension ages for men and women, and the fact that older women live longer and most often alone.

Source: https://ageing-equal.org/ageism-and-gender

Knowledge box

Stereotyping, prejudice and discrimination are the main reasons why people's life chances diverge throughout their lives. In many societies, girls' life chances become more limited than boys' when they reach school age, as boys' education is given priority. Girls with disabilities are the least likely to go to school. This is not because they are incapable but because of stigma attached to their gender and disability.

Girls who miss out on education often lose any chance of catching up in terms of employment, income level, decision-making opportunities and status. People belonging to other marginalised groups face a similar experience.

Disability and gender

People of all ages with disabilities face exclusion and discrimination on the grounds of both their gender and their disability.

An estimated 19 per cent of women across the world have a disability, compared with 12 per cent of men. In low- and middle-income countries, women constitute three quarters of people with disabilities. This higher prevalence is often attributed to women's longer life expectancy, the later onset of dementia and the impact of poor maternal health care, although different levels of self-reporting between women and men on disability may also be a factor.

However, gender analysis suggests that the higher prevalence of disability among women than men is a result of social and cultural norms relating to gender, such as systemic exclusion from healthcare and education, poorer nutrition and gender-based violence. For example, conditions such as cataracts that cause loss of sight normally occur later in life. Since women generally live longer than men, more women are affected by cataracts. However, women are less likely to receive sight-saving cataract surgery.

There is evidence that women and girls with disabilities are more likely to face discrimination and exclusion than men and boys with disabilities or people without disabilities. For example, women and girls with disabilities are at a greater risk of being excluded from screening services and diagnosis of health problems. They often feel more inhibited about seeking treatment for an illness because they do not know they have a right to healthcare, they have limited control of household finances, they may be restricted in terms of movement and mobility, or they may not have time, because of their caring responsibilities.

Women and girls with disabilities are more often denied their human rights, than men and boys, or people without disabilities. It is estimated that women with disabilities are twice as likely to experience domestic violence and other forms of gender-based and sexual violence as women without disabilities. They are more likely to experience violence and abuse over a longer period, and to suffer more severe injuries as a result.

Discriminatory attitudes to people with disabilities and women and girls may be due to a number of reasons, ranging from fear of the "other" and cultural beliefs about their value, to unconscious bias. The bridge from beliefs and attitudes to exclusion is power. Across the world, power has largely been maintained in favour of men without disabilities. This power imbalance has allowed inequalities to flourish.

Knowledge box

Section 2: Barriers to inclusion

Learning objective: Recognise barriers that prevent people from realising their rights because of stereotyping and discrimination.

Barriers are defined as factors that prevent a person from having full and equal access and participation in society. These can be environmental, including physical barriers (such as the presence of stairs and the absence of a ramp or an elevator) and communication barriers (such as only one format being used to provide information), attitudinal barriers (such as negative perceptions of older people or people with disabilities) and institutional barriers (such as policies that can lead to discrimination against certain groups).

Barrier analysis is a participatory way to identify the barriers that certain groups of people face that prevent them from realising their rights. Different groups of people face different barriers. For example, people with disabilities may face barriers to accessing healthcare services; older women may face barriers to getting a pension.

Barrier analysis supports a rights-based approach. It is based on the assumption that exclusion is the result of a person's rights not being fulfilled. It includes identifying the barriers people face to realising their rights and working to remove these by changing attitudes, behaviour, policies and laws, to rebalance power and resources throughout a community to everyone's benefit. This is in contrast to a needs-based approach that focuses on supporting people to meet their needs. This approach is less likely to overcome barriers necessary to bring about lasting change, that is, changes to institutional systems and social norms.

Visualise a brick wall that separates you from opportunities to play a full part in society. Imagine each brick represents a barrier.
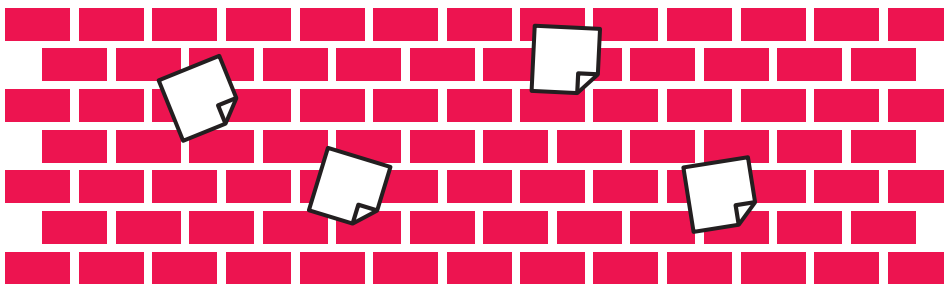
Attitudinal barriers may include:

- believing that women should not travel on public transport on their own
- seeing older people who need help with daily activities as a burden
- believing that girls do not need an academic education or a career as they will get married and stay at home
- perceiving women with disabilities as asexual or promiscuous which makes them targets of sexual abuse
- thinking women are "impure" during menstruation
- believing that men have a right over women's bodies
- families ceasing to respect men when they grow old
- poor treatment of older people and people with disabilities by healthcare workers
- believing that men should be tough and decisive
- thinking that people with dementia lack the capacity to make decisions.

Institutional barriers may include:

- laws on inheritance and land rights that dispossess women
- social pension policies that disregard unpaid work carried out by women and leave women without enough to live on in their older age
- laws or bank policies that prevent women from opening their own bank accounts
- requiring women show they have written permission from a male family member to travel on public transport
- children of mothers with disabilities being removed from their care
- removing older women from client-facing positions or work as TV presenters because they are considered unattractive
- not allowing deaf people to have driving licences
- discouraging girls from studying subjects such as science and engineering because these are seen as male domains
- not classing domestic violence as a crime.

Environmental barriers may include:

- public transport that is unsafe for women
- poor street lighting that increases the risk of attacks on women
- inaccessible public transport that makes it difficult for older people and people with disabilities to go out
- information not being provided in formats that people with low vision or hearing loss can use
- health centres having no wheelchair access for people with disabilities.

Knowledge box

Gender inequality in the law

Only six countries guarantee equal work rights to women and men. The World Bank's recent *Women, Business and the Law 2020* report measured gender discrimination in 187 countries. It found that only Belgium, Denmark, France, Latvia, Luxembourg and Sweden scored full marks on eight indicators – from receiving a pension to freedom of movement – influencing economic decisions women make during their careers. A typical economy only gives women three-quarters the rights of men in the measured areas.

Source: https://wbl.worldbank.org

- Many barriers to inclusion are connected with each other. Environmental barriers are often linked to institutions, which are made up of individuals. Attitudinal barriers are cross-cutting. They exist almost everywhere.

- Institutional barriers are sometimes subtle. They may seem normal. However, they can have an enormous effect on people's lives.

- There is a link between social norms (common values and beliefs), individual action (such as discrimination based on prejudice and stereotyping) and institutional action (driven by individuals' belief systems and prejudices). Interventions must consider all these factors and how they influence one another.

- Women are more often discriminated against than men. Intersecting characteristics (such as age, gender, ethnicity, disability, sexual orientation or location) can increase barriers to inclusion. Barriers can accumulate over the life course, creating further marginalisation in older age.

- This means that development interventions that aim to be inclusive, but only address certain exclusionary factors, such as age, gender, ethnicity, disability or sexual orientation, will leave many women, such as older women, women with disabilities, indigenous women or lesbians, facing barriers to inclusion based on their gender.

- There are numerous barriers facing large numbers of people. It is tempting to focus on supporting individuals to meet their needs. However, a needs-based approach is less likely than a rights-based approach to overcome barriers necessary to bring about lasting change, that is, changes to institutional systems and social norms.

- Based on a detailed barrier analysis, programme interventions need to find a balance in addressing environmental, institutional and attitudinal barriers. They also need to find a balance between supporting individuals and bringing about broader change (changing social norms).

Exercise: Barriers (table not completed)

Complete this table by putting a cross in the appropriate column(s).

Prejudice and discrimination	Barriers		
	Attitudinal	Environmental	Institutional

Gender

	Attitudinal	Environmental	Institutional
Men are breadwinners			
Women are not promoted over men			
Violence against women and girls is not taken seriously, so cases do not come to court or are thrown out			
Girls are not encouraged to go into higher education			
There are no safe sanitation facilities for women			
Women with disabilities are more likely to have their children taken away from them			

Persons

	Attitudinal	Environmental	Institutional
Persons with disabilities are not allowed to open bank accounts			
Public buildings are not accessible to people with disabilities			
Women with disabilities are abandoned by their partners because divorce/inheritance laws are in favour of men			
A rape victim must visually identify the perpetrator			

Older people

	Attitudinal	Environmental	Institutional
Age-related impairments are seen as normal so they are given low priority by health and rehabilitation services			
Older women are removed from public-facing positions because they are considered unattractive			
People above a certain age cannot take out insurance			
Widows have no right to inherit land or property			
Surveys and research studies only use data on people aged 15–49			
Older people, especially women, are thought incapable of learning new things or using modern technology			

Exercise: Barriers (completed exercise)

The answers are given below.

Prejudice and discrimination	Barriers		
	Attitudinal	Environmental	Institutional

Gender

Men are breadwinners	x		
Women are not promoted over men			x
Violence against women and girls is not taken seriously, so cases do not come to court or are thrown out	x		x
Girls are not encouraged to go into higher education			x
There are no safe sanitation facilities for women		x	
Women with disabilities are more likely to have their children taken away from them	x		

Persons

Persons with disabilities are not allowed to open bank accounts			x
Public buildings are not accessible to people with disabilities		x	x
Women with disabilities are abandoned by their partners because divorce/inheritance laws are in favour of men			x
A rape victim must visually identify the perpetrator			x

Older people

Age-related impairments are seen as normal so they are given low priority by health and rehabilitation services	x		x
Older women are removed from public-facing positions because they are considered unattractive	x		x
People above a certain age cannot take out insurance			x
Widows have no right to inherit land or property			x
Surveys and research studies only use data on people aged 15–49			x
Older people, especially women, are thought incapable of learning new things or using modern technology	x		

Quiz

Try this quiz to check what you have learnt from this module. Answers at the end.

1. What type of discrimination are these:

a. A bus company only allows men to be recruited as drivers.

☐ Direct discrimination

☐ Indirect discrimination

☐ Positive discrimination

b. Only close-shaven men can work for the company, whatever their religion.

☐ Direct discrimination

☐ Indirect discrimination

☐ Positive discrimination

c. A company is recruiting only women to senior management positions to improve the gender balance in the team.

☐ Direct discrimination

☐ Indirect discrimination

☐ Positive discrimination

2. What kind of barriers do the women in the following stories face (you can tick more than one):

a. The health system focuses on maternal health. However, the health effects of childbearing continue to be felt by women in their older age. Many older women suffer from fistula or prolapse, but only limited services are available for treating these.

☐ Environmental barriers

☐ Attitudinal barriers

☐ Institutional barriers

b. Nyamizi was accused by a neighbour of bewitching her child. She was brutally attacked but her attacker was never brought to justice.*

☐ Environmental barriers

☐ Attitudinal barriers

☐ Institutional barriers

*Read Nyamizi's full story on the HelpAge website: https://www.helpage.org/newsroom/life-stories/rights/ nyamizi-73-tanzania/

3. An older women is less likely to be offered a job as a TV presenter than a younger woman.

☐ True

☐ False

4. In many societies, girls are less likely than boys to go to school. This will affect:

☐ Their chance to choose their future partner

☐ Their chance to get a job

☐ Their chance to stay healthy

☐ All of the above

5. A needs-based approach works at:

☐ Individual / family / community level

☐ Government / policy / religious leadership level

6. A needs-based approach is often concerned with:

☐ Future needs

☐ Immediate needs

7. A rights-based approach explores barriers people face to realise their:

☐ Dreams

☐ Rights

☐ Ambitions

8. A rights-based approach aims to bring about:

☐ Small changes

☐ Immediate change

☐ Systemic change

Answers: 1a Direct discrimination; 1b Indirect discrimination (some religions such as Sikhism require men to have a beard); 1c Positive discrimination; 2a Institutional, attitudinal; 2b Attitudinal and institutional; 3 True; 4 All of the above; 5 Individual / family / community; 6 Immediate; 7 Rights; 8 Systemic change

Module 3

Gender analysis and mainstreaming

Section 1: Gender mainstreaming principles

Learning objective: Understand the key principles of gender mainstreaming.

Gender mainstreaming means integrating a gender equality perspective in policies, programmes and projects. Women, men and people of other genders have different needs and circumstances, including unequal access to and control over power, resources, human rights and institutions. The aim of gender mainstreaming is to take into account these differences when designing, implementing and evaluating policies, programmes and projects, so that they benefit women, men and people of other genders and do not increase inequality but enhance gender equality. Gender mainstreaming aims to solve sometimes hidden gender inequalities. It is therefore a tool for achieving gender equality.

While gender mainstreaming is essential for securing human rights and social justice for women as well as men, it is increasingly recognised that incorporating gender perspectives into different areas of development is necessary to achieve other social and economic goals.

> Gender mainstreaming means putting gender equality at the centre of your work. It means considering gender in, for example, policy decisions, planning, budgeting, and organisational structures and operations.

⚑ **Remember**

Elements of gender mainstreaming include:

In projects (or programmes):
- Collect and analyse sex-, age- and disability-disaggregated data at all stages of a programme, starting with baseline data (see the Annex for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance).
- Use findings from a gender and age analysis to inform the outcomes and activities of the project.
- Select indicators that reflect the anticipated changes and benefits for both women and men.
- Include specific outcomes on gender equality in your monitoring and evaluation framework (if the project is gender-transformative).
- Design and implement the project in a way that challenges existing gender norms (if the project is gender-transformative).
- Encourage meaningful consultation with and active participation of people of all gender identities at the design, planning, implementation, monitoring and evaluation stages of the programme.
- Fully integrate gender and age analysis, and report on gender-related impacts, in project evaluations and reviews.
- Formalise the requirement for partners to mainstream gender in MOUs.

In advocacy interventions:
- Set advocacy objectives that respond to issues identified from gender and age analysis. Your advocacy objectives might not be gender-transformative but it is recommended that they are, at the very least, gender-sensitive.
- Include women, men and organisations with influence on issues around gender equality in your target audience.

- Consider the level of awareness of the audience you are targeting in relation to any gender issues you have identified.

- Conduct an informal assessment and/or intelligence-gathering regarding gender-sensitivity of partners, including network members.

- Collect and analyse sex-, age- and disability-disaggregated data throughout the advocacy cycle (see the Annex for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance). Make this data publicly available, with consideration of data protection issues, to encourage its uptake and re-use by key stakeholders.

- Ensure advocacy outputs reflect findings from gender and age analysis.

- Articulate advocacy asks and messaging to:
  - be inclusive of needs (practical and strategic), perspectives, rights and challenges faced by women and men and promote gender equality
  - challenge stereotypes and represent the diversity of roles of women and men in both content and visuals
  - ensure voices of women and men are included in advocacy messaging and language is gender sensitive
  - avoid any gender stereotyping in the language used.

- Design advocacy outputs, including visuals and photos, to be gender balanced.

- Take into account any gender-specific patterns of behaviour or barriers in relation to accessing information in disseminating advocacy outputs (e.g. access to mobile devices newspapers, etc).

- Engage people with influence on gender issues in the dissemination plan.

- Identify gender-sensitive or gender-transformative progress on the part of audiences targeted through advocacy activities.

In organisations:
- Include a gender and age analysis in country and regional business plans and Theories of Actions.

- Identify an active gender focal point in each office.

- Train existing staff on gender equality and induct new staff in HelpAge's Gender equality policy within three months of starting.

- Set senior managers a performance objective on gender mainstreaming.

- Include progress on gender mainstreaming in annual reports and present a summary each year to the trustees.

- Collect, analyse and report on sex-, age- and disability-disaggregated data on recruitment, promotion and retention of staff (see the Annex for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance).

- Ensure a gender balance of selection panels and equality training for selection panel members in recruitment policies and procedures.

- Provide equal pay for all staff performing the same roles.

- Set gender equality targets for senior management positions.

- Provide leadership training opportunities for staff regardless of their gender.

- Have policies on sick leave, childcare and maternity/paternity leave.

- Have policies on protection from sexual harassment, bullying and discrimination.

For more information, please see HelpAge's Minimum standards for gender mainstreaming. This includes a gender marker for assessing how gender-sensitive a programme is. It also includes a recommended set of organisational structures to support gender mainstreaming.

For advocacy interventions, please see HelpAge's Gender analysis: a checklist for producing advocacy outputs. This includes a set of gender mainstreaming recommendations for all stages of the production process. These resources are listed in the Annex.

Gender mainstreaming does not mean adding on "something for women" to an existing activity, or ensuring women form a certain percentage of participants, such as 50 per cent of those taking part in training or a project.

Gender mainstreaming may mean changing your goals, plans and actions to ensure that both women and men can influence, participate in and benefit from development interventions. It may require changes to organisational structures, procedures and cultures to create environments that truly help to promote gender equality.

Section 2: Gender analysis

Learning objective: Understand gender analysis areas of enquiry and questions.

Gender analysis is a tool for examining the differences between the roles that women and men play, the different levels of power they hold, their differing needs, constraints and opportunities, and the impact of these differences on their lives. Where data broken down by sex and age reveals gender differences and inequalities, gender analysis explores the reasons behind these differences and helps us understand the impact of our work on older women and men, and older people of other genders.

A gender and age analysis provides qualitative information on gender differences and inequalities, and how they change across the life course. It helps us understand specific issues faced by older women and men, and older people of other genders, and how gender norms, roles and relations change with age.

Gender analysis helps us to design projects (or programmes) and advocacy interventions that consider gender issues and contribute to gender equality. It should continue to be carried out at different points in the project and advocacy cycles.

Gender analysis has different components. Broadly speaking, it looks at:

- Who does what?
- Who has what? Who can use what and who has control over it?
- How widespread is violence and what is the risk of experiencing it?
- Who has information about what? Who do they share this information with?
- Who participates at what level and for what purpose?
- What are the policies, laws, norms and structural constraints? Who benefits from these?

Areas of enquiry

Key areas of investigation in a gender analysis are:

- Roles and responsibilities (division of labour)
- Access to and control over resources
- Bodily autonomy, violence and safety
- Knowledge and information
- Aspiration and participation
- Duty-bearers and institutions

The danger of a single story

To learn more about diversity, how to challenge prejudices, and understand how each individual has a unique experience, watch Chimamanda Ngozi Adichie's Ted Talk: **https://www.ted.com/talks/chimamanda_ngozi_adichie_the_danger_of_a_ single_story?language=en**

Areas of enquiry and questions for gender analysis

Areas of enquiry	Questions
Roles and responsibilities (division of labour) *Power to*	**Who does what?** • What do women, men and people of other genders do (tasks/chores responsibilities)? • Where do they carry out these activities (in the house, community, workplace or an institution)? • How often do they do them (daily and seasonal patterns)? How long do they spend? • Has anything changed since the disaster/conflict/crisis? *Remember: productive, reproductive and community roles*

Access to and control over resources
 	
Power to
Power over
Power with
	Who has what? Who can use what and who has control over it?
	• What assets, resources and opportunities do women, men and people of other genders have access to?
	• Who has control over these?
	• Who receives an income (inside and outside the household)? Who can decide what to do with the money?
	• Who can inherit land or property and who decides on this?
	• How are budgets allocated and spent?
	  – at household level?
	  – at community level?
	• Who is allocated public resources? Who receives these resources?
	  – at household level (such as social pensions, benefits, services, humanitarian assistance)
	  – at community level (such as budget allocation and expenditure on services and infrastructure, support during or after a disaster/conflict/crisis)
	• Who has social capital (such as social networks and support networks)?
	• Has this changed since the disaster/conflict/crisis?

Bodily autonomy, violence and safety *Power over* *Power to* *Power within*	**How widespread is violence and what is the risk of experiencing it?** • Has access to employment outside the house increased the risk of abuse or violence at home, at work or in transit to or from the workplace? • What are the occupational health risks (such as during menopause or in relation to a disability)? • What are the risks of abuse or violence for women, men or people of other genders who are dependent on a carer or have lost their legal capacity? • What protection risks are there during a disaster/conflict/crisis, including risk of gender-based violence? • Have risks and power dynamics changed since the disaster/conflict/crisis?

Areas of enquiry	Questions
Knowledge and information *Power over* *Power to* *Power within* *Power with*	**Who has information about what? Who do they share this information with?** • Who knows about government policies and programmes and how to access them (such as social protection)? • Who knows about institutional policies and programmes (such as equal opportunities in recruitment, wage parity, sexual harassment prevention, complaints and grievance mechanisms)? Are these shared with and explained to everyone? • Who knows how to access services (such as health, income, legal, gender-based violence support services, humanitarian assistance)? • Who is a member of, or has access to social or economic networks, unions or humanitarian committees to share information and knowledge and have mutual support? • How does this information give someone power and status? • Has the place for obtaining information and sharing knowledge changed since the disaster/conflict/crisis?
Aspiration and participation *Power to* *Power within* *Power with*	**Who participates at what level and for what purpose?** • Do all women, men and people of other genders, have the same choice of activities (such as training or volunteer opportunities)? • Do women, men and people of other genders have the freedom to access public spaces and participate in project activities? Can they make decisions and express their opinions? • Are women, men and people of other genders supported to participate (such as through safe spaces for everyone to speak, accessible and inclusive venues, consideration of time constraints or caring responsibilities, adaptation of learning styles, measures to build self-confidence)? • Who participates in decision-making at household and community levels? What kind of decisions (level of importance and influence, opportunities for planning projects)? • Have decision-making structures changed since the disaster/conflict/crisis?
Duty bearers and institutions *Power over* *Power to* *Power with*	**Who benefits?** • What are the laws, policies, norms and structural constraints and who benefits from the status quo? • How do religious or political groups set rules and policies or laws that maintain situations for their own benefit rather than for everyone (such as division of labour)? • Has this changed since the disaster/conflict/crisis? Have policies been revised, updated or abandoned? • How are organisations responding to gender issues (such as collecting and using data broken down by sex, age and disability, staff training, recruitment, resourcing, policies, information management, communication)? • Who benefits at individual, family, community and institutional levels? • Is the distribution of benefits different from before the disaster/conflict/crisis?

Gender-based violence in Cambodia

The needs assessment of an international organisation working in partnership with a Cambodian organisation found a high prevalence of domestic violence against older women with disabilities. Factors that contributed to the violence included:

- poverty
- high alcohol consumption by male family members
- patriarchal social norms in which women were perceived as inferior and subordinate to men
- disabilities in older women which further decreased women's status and power.

The main components of the project focused on:

- livelihood activities
- awareness-raising on gender inequality and the rights of women, particularly women with disabilities, in the families and the communities.

For empowerment and sustainability, the project sought to engage older women with disabilities as volunteers to work with families and communities. Their role was to identify abuse, counsel abusive partners, and campaign in the communities for more awareness and support.

However, it turned out to be difficult to recruit as many older women with disabilities as anticipated. Many had no time to spare from household responsibilities, including caring for family members, pursuing income-generating activities and doing other voluntary work. As an alternative, the project filled the volunteer positions with older men with disabilities.

To some degree, this was a positive move. Though not planned, it allowed men to counsel other men on alcoholism and violence. This would have been more difficult for women to do. However, it also required additional safeguarding and protection measures to be put in place to protect the safety of women, and provide considerably more training and monitoring of the men to prevent the empowerment aspect of women being lost by men's involvement.

Learning points

A gender analysis would have highlighted the division of labour between women and men (who does what). This could have informed the design of the project.

Project development should be based on the recognition that women and men:

- have different legal and customary rights
- have control of and access to different resources
- have different jobs within the household
- allocate their time differently
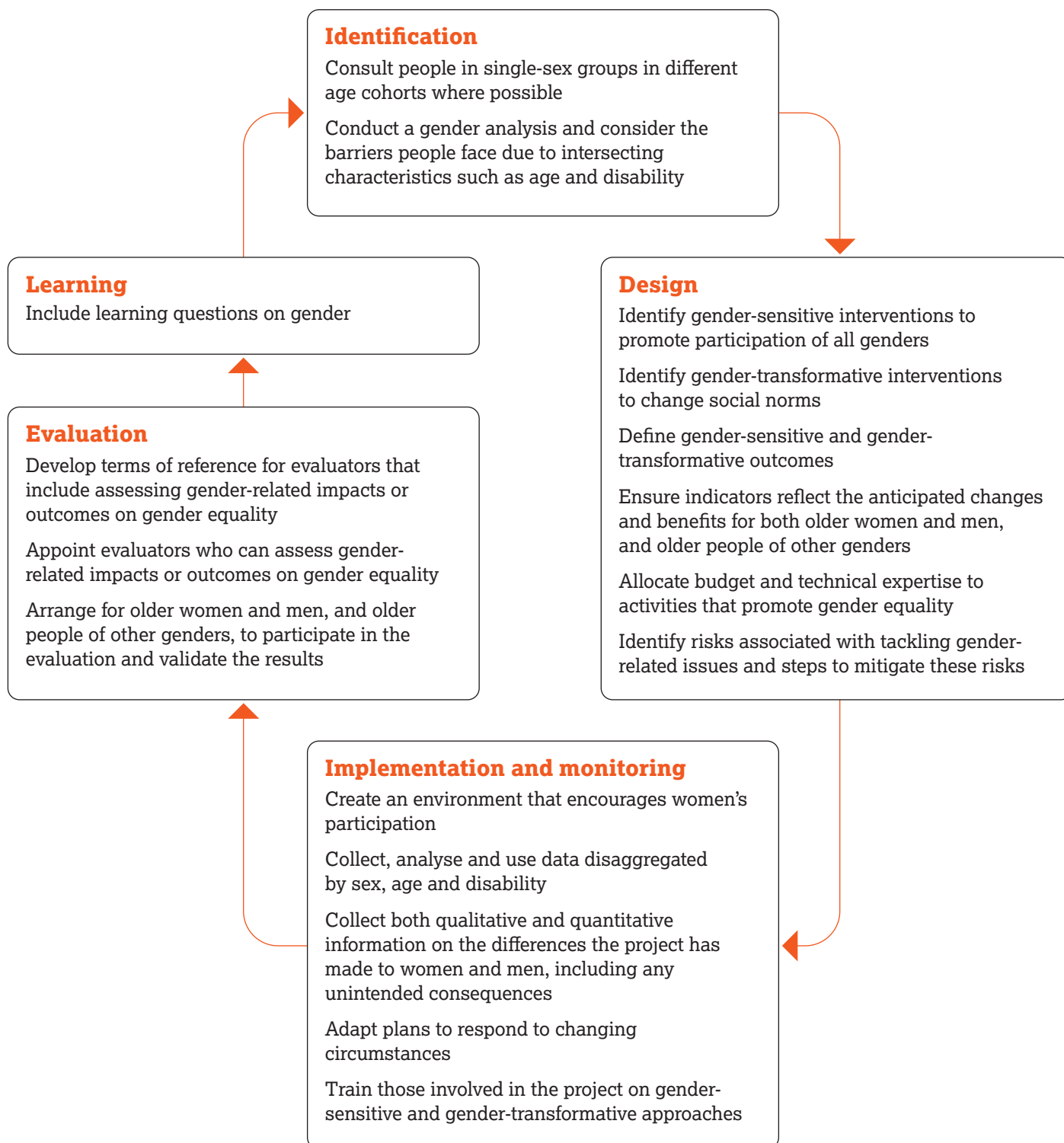- have different priorities and goals.

31 Gender equality learning pack. Module 3: Gender analysis and mainstreaming

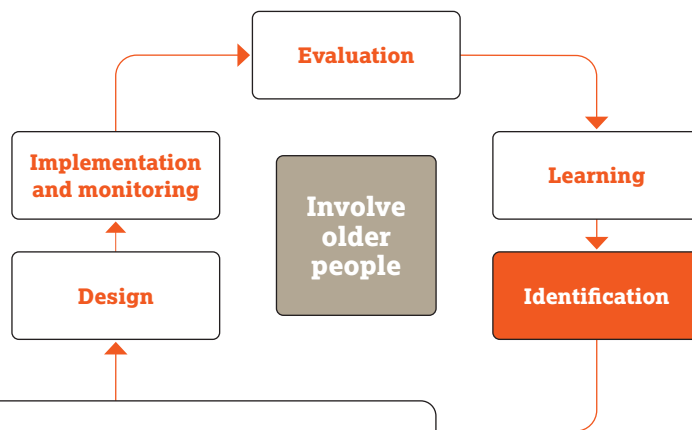Registered charity no. 288180. Copyright © HelpAge International 2020

Section 3: Applying gender mainstreaming in projects

Learning objective: Know how to apply gender mainstreaming in projects (or programmes).

A gender and age analysis should be carried out at the earliest stage of the project cycle to assess the current situation. It should be an iterative process (repeated at every stage of the cycle as more data is continually collected).

Identification

Consult people in single-sex groups in different age cohorts where possible

Conduct a gender analysis and consider the barriers people face due to intersecting characteristics such as age and disability

Learning

Include learning questions on gender

Evaluation

Develop terms of reference for evaluators that include assessing gender-related impacts or outcomes on gender equality

Appoint evaluators who can assess gender-related impacts or outcomes on gender equality

Arrange for older women and men, and older people of other genders, to participate in the evaluation and validate the results

Design

Identify gender-sensitive interventions to promote participation of all genders

Identify gender-transformative interventions to change social norms

Define gender-sensitive and gender-transformative outcomes

Ensure indicators reflect the anticipated changes and benefits for both older women and men, and older people of other genders

Allocate budget and technical expertise to activities that promote gender equality

Identify risks associated with tackling gender-related issues and steps to mitigate these risks

Implementation and monitoring

Create an environment that encourages women's participation

Collect, analyse and use data disaggregated by sex, age and disability

Collect both qualitative and quantitative information on the differences the project has made to women and men, including any unintended consequences

Adapt plans to respond to changing circumstances

Train those involved in the project on gender-sensitive and gender-transformative approaches

Gender mainstreaming at different stages of a project

Identification

Gender-sensitive or gender-transformative

- Disseminate information about the project widely, including working with older people's associations, women's rights organisations or disabled people's organisations to identify older women and men, and older people of other genders (including those with disabilities) to participate in consultations.

- Conduct a needs assessment. This should include a gender analysis at individual, household and community level (which should explore people's intersecting identities and whether these increase the barriers they are facing). Compare the following for older women and men, and older people of other genders:

  - confidence and autonomy

  - skills and training needs

  - poverty status including allocation and control of resources

  - risk of domestic violence

  - household and unpaid care responsibilities

  - aspirations for paid work (e.g. type of work, shift patterns)

  - healthcare needs

  - infrastructure needs (e.g. childcare, transport).

- Include a risk assessment to mitigate the risks for women in participating in the needs assessment, especially when discussing gender-based violence. Ensure:

  - Consultations are held with single-sex groups in different age cohorts where possible.

  - Women can safely express their opinions.

  - Consultation venues and timing are such that women can reach them safely. Budgets include communication support for participants with disabilities or low literacy.
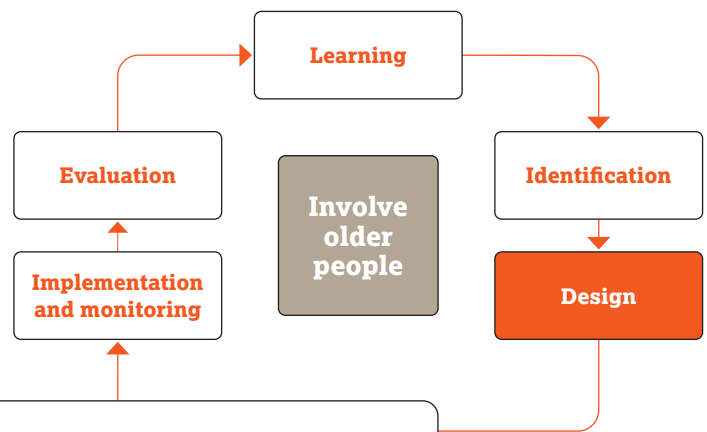
Design

Gender-sensitive approach

- Gender and age analysis inform the outcomes and activities of the project.

- Plan activities that consider:

  - older women's and men's time spent on household activities and work outside the home, including time spent travelling to work or other places, availability, cost and accessibility of transport, accessibility of infrastructure such as health centres.

  - older women's educational level, skills and confidence in relation to older men's.

- Select indicators that reflect the anticipated changes and benefits for older women and men, and older people of other genders.

- Fully integrate a gender and age analysis into project evaluations and reviews, and incorporate learning questions into the monitoring, evaluation and learning (MEAL) framework.

- Budget and allocate resources to activities that promote gender sensitivity.

- Ensure reporting requirements include references to gender-related impacts.

Gender-transformative approach – additional requirements

- Define specific outcomes on gender equality.

- Include a gender expert in the design team to advise on gender mainstreaming. Budget for a gender expert in the project team to provide technical advice on gender mainstreaming during implementation.

- Include project activities that seek to promote gender equality at the individual, relationship, community and institutional levels. For example, activities that build older women's autonomy, self-esteem and social networks, engage men and boys in changing attitudes and norms, and encourage the equitable division of labour and decision-making.

- Design the project to challenge existing gender norms:

  - Address social expectations about older women's and men's roles and status in the home and community, and support participation in project activities.

  - Address institutional barriers e.g. in relation to policies and practices regarding access to social protection or healthcare.

- Plan and budget for a possible backlash against older women and men and older people of other genders involved in the project (in relation to championing gender equality). Identify steps to mitigate the risk.

- Select indicators to measure changes in gender norms, attitudes and behaviours (including violence, abuse and neglect) in the proposed outcomes.

- Cost and allocate resources to activities that promote gender equality beyond the project period.

Identification

Learning

Involve older people

Design

Evaluation

Implementation and monitoring
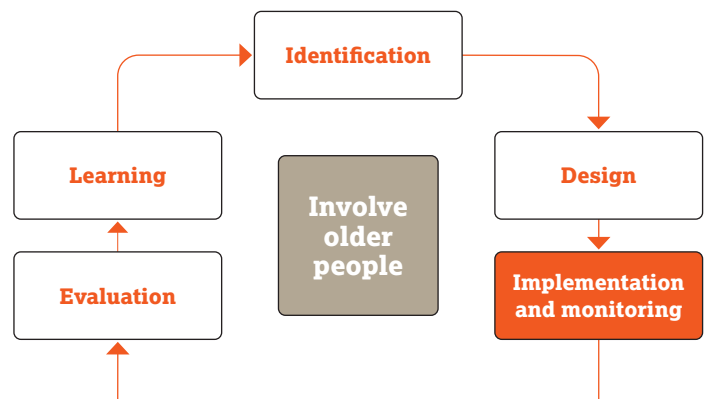
Implementation (including project inception)

Gender-sensitive approach

- Develop a gender strategy to guide how the project is implemented and monitored.

- Make expectations and tasks related to gender clear in project team members' terms of reference and job descriptions. Where appropriate, include gender-related qualifications in person specifications.

- Conduct capacity assessments to assess project team members' capacity to adopt a gender-sensitive approach.

- Deliver gender training at the start the project and refresher training annually, including training staff on gender mainstreaming and analysis.

- As far as possible, ensure a gender balanced project team.

- Include gender-related qualifications in person specifications for consultants and short-term staff.

- Train data collectors on gender-sensitive approaches, including how to handle any disclosures of abuse.

- Identify safe, confidential and appropriate referral pathways (and regularly update information), for survivors of violence, abuse and neglect. Ensure all staff are trained on making referrals and have written information about where to refer survivors for care and support.

Gender-transformative approach – additional requirements

- Include a gender expert in the project team to provide technical oversight of gender mainstreaming and analysis.

- Monitor how far the project is adhering to the project's gender strategy (by arranging regular meetings to assess progress).

- Develop gender-sensitive workplans. For example:

    – Ensure women can participate in project activities (considering timing, location, etc)

    – Regularly monitor the situation of older women and older men participating in the project and the effect that their participation is having on them. For example, what is the effect on unpaid household work carried out by older women themselves or by other family members (such as their daughters or granddaughters, if they are having to take over some jobs), access to public services, and changes in their relationships with other members of the household?

- Obtain feedback on project processes.

- Put in place a range of accessible feedback and complaints mechanisms that allow women to safely put forward their concerns without having to be asked.
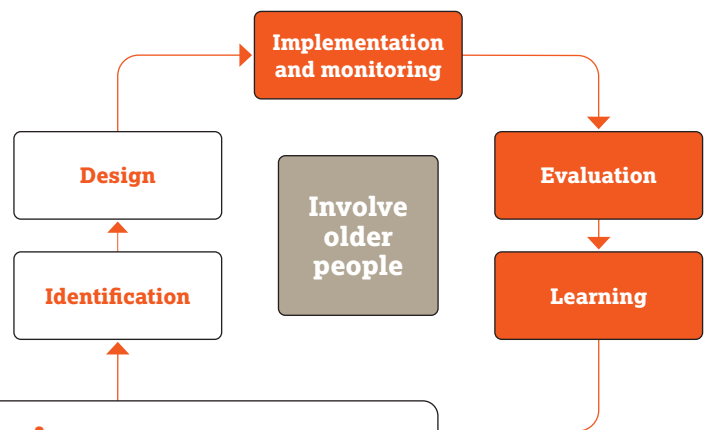
Monitoring, evaluation and learning

Gender-sensitive approach

- Fully integrate a gender and age analysis into project evaluations and reviews, and incorporate learning questions into the monitoring, evaluation and learning (MEAL) framework.

- Disaggregate monitoring data by sex, age and disability at a minimum.

- Include sex, age and disability data in reporting templates.

- Collect data from older women and men, and older people of other genders (with cross reference to age cohorts recommended by HelpAge), including those with different disabilities.

- When collecting data, arrange for separate discussions or interviews to be conducted by a facilitator or interviewer of the same gender.

- Ensure that data is consistently recorded with a code for sex, age and disability together.

- Use a consistent index for disaggregating disability data (i.e. the Washington Group questions).

- Analyse and report on the different outcomes for those targeted by the project, referring to their sex, age and disability status.

- Include a gender expert on the evaluation team.

- Ensure terms of reference for the evaluation explicitly addresses gender (in research questions, data disaggregation requirements, ethics and stakeholders to consult).

- Consult project participants of different ages (with cross reference to age cohorts recommended by HelpAge), genders and disabilities.

- Develop evaluation questions that ask:

  - How consistently has a gender and age analysis been carried out throughout the project, and how have the results been used to alter the project?

  - How far have older women and men and older people of other genders participated in the project?

  - How far has the project contributed to changes and benefits for older women and men, and older people of other genders?

- Include learning questions about gender-sensitive interventions.

Gender-transformative approach – additional requirements

- Develop evaluation questions that show how far the project has contributed to gender equality.

- Include learning questions about activities to promote gender equality. Ask what barriers to inclusion are still being experienced by people at risk of marginalisation and why this is.

- Allow participants of different genders the opportunity to validate learning outcomes.

Political representation

In partnership with local older people's associations in a country in South Asia, an international organisation designed and implemented a project to increase the political representation of older people.

Women and men over 50 years old were invited to take part in training as candidates to stand in elections to serve on various community development committees. The initial training sessions were attended by almost equal numbers of women and men. However, as time went on, the numbers of women began to decline. Later in the project, women also dropped out of small working groups set up to prepare election processes and campaign messages.

In the event, only a small number of women stood for election and no woman was elected. Women only participated in committees that dealt with primary healthcare, hygiene or nutrition services, and subsistence farming methods.

Learning points

What happened? A gender analysis would have pointed to the following challenges:

- Working groups were scheduled by mentors to suit their own availability. This was usually in the evening when women had household/reproductive commitments or did not feel comfortable/confident about going out.

- The venues and timing of campaign planning sessions made it difficult for women to reach them safely on their own.

- Committees focusing on reproductive themes were more accessible to women. Women were therefore more ready to join them than committees that seemed to be aimed towards men.

- Men were usually more outspoken and dominant than women, giving women fewer opportunities to speak and be listened to.

- Women needed someone to accompany them on the campaign trail (for assistance and/or protection). However, there was not enough in the budget for this. Men were more flexible and independent. Budgets were mostly allocated by men who did not plan for women to be accompanied.

Section 4: Applying gender mainstreaming in fundraising and advocacy

Learning objective: Know how to apply gender mainstreaming in fundraising and advocacy.

Proposal development process

- Project participants should be involved throughout the proposal development process.

- The funding proposal should be based on the situational analysis carried out at the start of the project cycle. This should include a gender analysis and consideration of the barriers people face due to intersecting characteristics such as age and disability.

- The donor's position on gender needs to be explored. Does the donor expect a gender-sensitive or gender-transformative approach? Are they willing to provide technical and financial support to ensure a gender-sensitive or gender-transformative approach? If they do not expect to support interventions promoting gender equality, could they be persuaded to provide extra financial support to include a gender-related component?

- The findings from the situational analysis should be incorporated into the concept note, clearly and consistently, differentiating findings by gender, age, disability and other relevant identities.

- The theory of change and funding proposal need to identify activities that promote gender equity and/or gender equality. They need to include indicators to show how far this has been achieved, and budget allocations to support this.

See HelpAge's Minimum standards for gender mainstreaming (listed in the Annex) for more details.

Budget considerations

A gender-sensitive budget breaks down resource allocation by gender. This helps to create more gender-equitable expenditure.
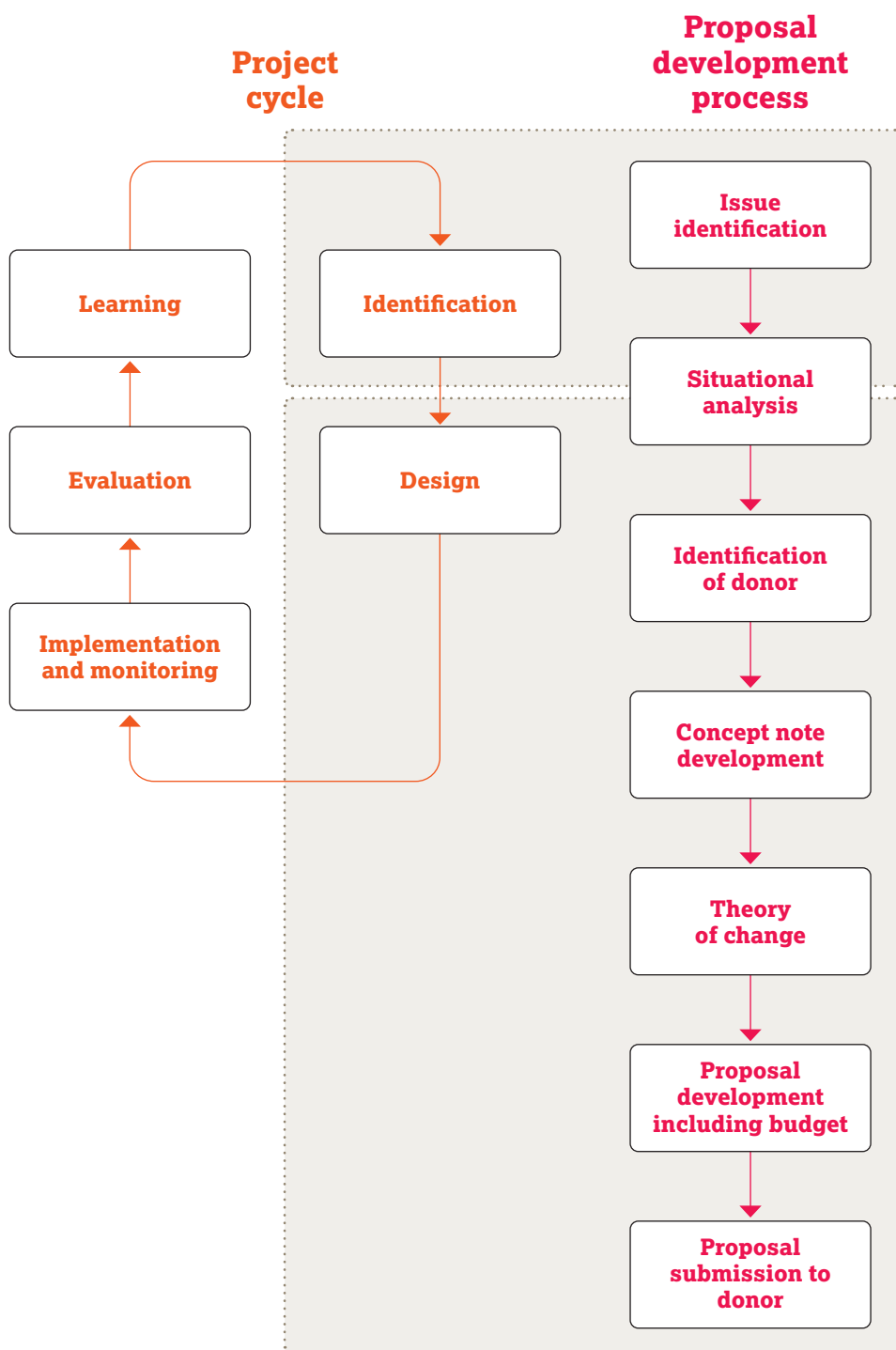
A gender-sensitive budget does not simply divide money and resources 50–50 between women and men. A 50–50 division may be equal, but is not necessarily fair.

A gender-sensitive budget uses sex-disaggregated data to show how many people of which sex will be employed or have a role in the delivery of the project, what kind of jobs they will do and what they will earn, who will receive training, who will decide how resources are allocated, and so on.
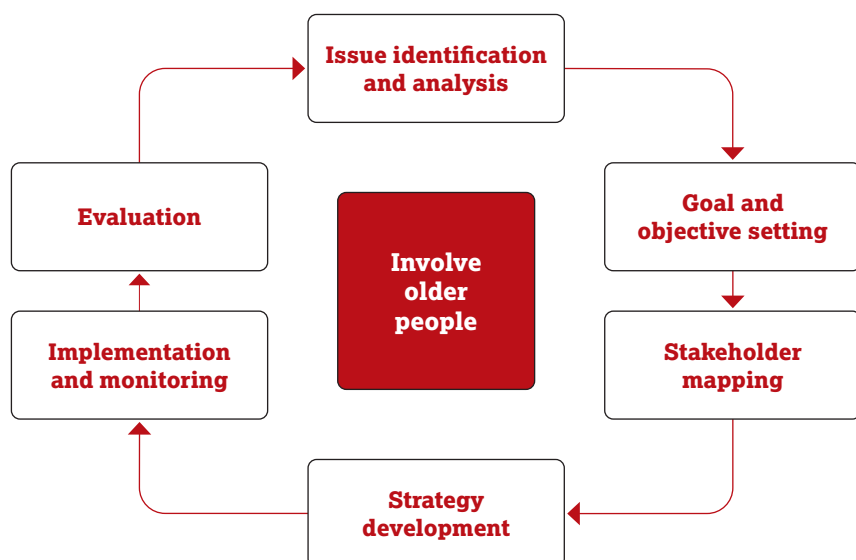
Indicators for gender-sensitive budgeting include:

- gender balance of project team (staff, service providers and volunteers)

- share of expenditure on activities designed to meet the priorities of older women and men, and older people of other genders, such as promoting rights, political participation, representation in the media and participation in civil society organisations

- gender-sensitive support to community organisations, such as grants and technical support to women's groups

- gender balance in training.

The funding proposal is developed during the identification and design stages of the project cycle

Project cycle

Proposal development process

```
Learning          Identification          Issue identification
                                                 ↓
Evaluation        Design                  Situational analysis
                                                 ↓
Implementation                            Identification of donor
and monitoring                                   ↓
                                          Concept note development
                                                 ↓
                                          Theory of change
                                                 ↓
                                          Proposal development
                                          including budget
                                                 ↓
                                          Proposal submission to donor
```

Advocacy cycle

The advocacy cycle can start at almost any stage of the project cycle, depending on organisational policy and advocacy opportunities. However, it may be best to carry out advocacy when you have obtained data and evidence to support your advocacy messages.

- Set advocacy objectives that respond to issues identified from gender and age analysis. Your advocacy objectives might not be gender-transformative but it is recommended that they are, at the very least, gender-sensitive.

- Include women, men and organisations with influence on issues around gender equality in your target audience.

- Consider the level of awareness of the audience you are targeting in relation to any gender issues you have identified.

- Conduct an informal assessment and/or intelligence-gathering regarding gender-sensitivity of partners, including network members.

- Collect and analyse sex-, age- and disability-disaggregated data throughout the advocacy cycle (see the Annex for HelpAge's Sex, age and disability disaggregated data (SADDD): minimum standards and guidance). Make this data publicly available, with consideration of data protection issues, to encourage its uptake and re-use by key stakeholders.

- Ensure advocacy outputs reflect findings from gender and age analysis.

- Articulate advocacy asks and messaging to:
  - be inclusive of needs (practical and strategic), perspectives, rights and challenges faced by women and men and promote gender equality
  - challenge stereotypes and represent the diversity of roles of women and men in both content and visuals
  - ensure voices of women and men are included in advocacy messaging and language is gender sensitive
  - avoid any gender stereotyping in the language used.

- Design advocacy outputs, including visuals and photos, to be gender balanced.

- Take into account any gender-specific patterns of behaviour or barriers in relation to accessing information in disseminating advocacy outputs (e.g. access to mobile devices newspapers, etc).

- Engage people with influence on gender issues in the dissemination plan.

- Identify gender-sensitive or gender-transformative progress on the part of audiences targeted through advocacy activities.

See HelpAge's Gender analysis: a checklist for producing advocacy outputs (listed in the Annex) for more details.

Gender-sensitive data

Gender-sensitive data is data broken down by sex or gender. It involves collecting quantitative and qualitative data on women, men and people of other genders separately, as well as data on other characteristics including age (using HelpAge's recommended age cohorts), gender, ethnicity, disability, sexual orientation or location, as far as relevant.

<table>
<tr>
<td>

Collecting gender-sensitive data:

- enables you to compare the different circumstances of women, men and people of other genders

- is necessary to monitor the different impacts for women, men and people of other genders.

</td>
<td>

📖 **Learning points**

</td>
</tr>
</table>

Gender-sensitive indicators

Gender-sensitive indicators reflect the anticipated changes and benefits for women, men and people of other genders. They take into account gender relations to show:

- whether there has been any change in the status of women, men or people of other genders

- how much change there has been in the status of women, men or people of other genders

- whether the needs of women, men and people of other genders have been met equitably

Gender-sensitive indicators relating to the project goal and objectives should be informed by a gender analysis.

Quantitative and qualitative indicators

Indicators can be quantitative or qualitative. Both types should be used.

Quantitative indicators measure quantity. They are represented by numbers. They are considered objective (not dependent on anyone's opinion). They can be checked. For example:

- overall numbers of older women and men, and older people of other genders participating in the project

- numbers of older women and men, and older people of other genders involved in advocacy campaigns

- numbers of older women and men, and older people of other genders in community-based leadership roles

- numbers of older women and men, and older people of other genders who are literate

- numbers of older women and men, and older people of other genders accessing social pensions through the project.

Quantitative indicators can also be used to measure changes in attitudes or behaviour. For example:

- percentage of men who think domestic violence is acceptable

- percentage of community leaders who believe in witchcraft

- percentage of older women who think that early marriage is acceptable

- percentage of older men who share household chores equally with their wife or partner.

<table>
<tr>
<td>

Quantitative indicators are used to measure quantity. They are represented by numbers. They are considered objective (not dependent on anyone's opinion). They can be checked.

</td>
<td>

📖 **Learning points**

</td>
</tr>
</table>

Qualitative indicators are used to measure people's responses or experience of a particular issue. They are used to measure the impact of an intervention. They look at aspects of the project that cannot be measured by numbers, such as people's attitudes, beliefs and behaviour. They are usually subjective (depend on someone's opinion). For example:

- the level of acceptance of female community leaders

- the level and type of financial decision-making in families

- the level and type of female participation in organisational decision-making

- the level of gender equality in specific laws or policies, e.g. land rights, inheritance and labour laws

- the level of violence, abuse and neglect against older women, including sexual, physical, emotional and financial abuse

- the level of access to and quality of health services for older women and men, and older people of other genders with disabilities

- quality of psychosocial support to older women and men, and older people of other genders, with and without disabilities, in refugee or internally displaced people's camps

- the ability of older women and men, and older people of other genders to exercise their voice in different contexts and whether their voices are heard by decision makers.

Learning points

You can use a scale system to determine the levels. For example, you could ask people to agree or disagree with a statement on a scale of 1 to 5 (1: strongly disagree; 2: disagree; 3: neither agree nor disagree; 4: agree; 5: strongly agree.

How to develop indicators

Keep in mind that indicators:

- should be developed with women, men and people of other genders

- must be relevant to the needs of women, men and people of other genders

- must be sex-, age- and disability-disaggregated

- should be both quantitative and qualitative

- should be clearly defined so that everyone understands what they are

- should remain constant, so that all the data collected, can be interpreted in the same way, no matter who has collected it

- should allow for comparison and thus measurement of change over time

- should measure things it is possible for the project to change.
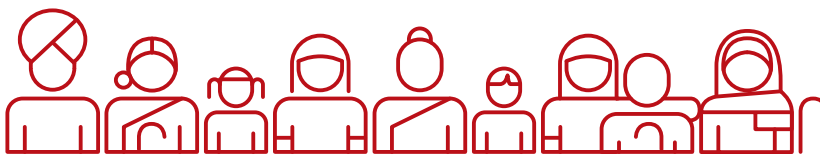
Section 5: Applying gender mainstreaming in organisations

Learning objective: Understand how to support gender mainstreaming in an organisation.

Organisational gender mainstreaming means putting gender equality at the centre of your work. It means considering gender in, for example, policy decisions, planning, budgeting and institutional structures and operations. It may require changes to the organisation's structure, procedures and culture to create an environment that truly helps to promote gender equality.

There are four ways of promoting gender equality within an organisation:

- Build political will
- Strengthen technical capacity
- Promote a positive organisational culture
- Institute mechanisms for individual, programmatic and organisational accountability.

Political will is a concept which highlights the ways in which leaders use their position of power to communicate and demonstrate their support, leadership, enthusiasm for and commitment to working towards gender equality in the organisation. These may include:

- Adopting and ensuring the implementation of an organisational policy that supports commitment to gender equality
- Reinforcing that commitment through organisational strategy processes and communications
- Demanding new procedures for recruiting, hiring and promoting staff
- Establishing ways to measure and recognise progress.

Technical capacity is the ability, qualifications and skills that individuals in an organisation need to apply gender mainstreaming to projects (or programmes) and organisational processes. These may include:

- Moving beyond awareness to application
- Facilitating changes to organisational procedures as well as strengthening individual skills
- Contributing to an ongoing community of learning among staff e.g. through global thematic learning groups.

Organisational culture refers to the norms, customs, beliefs and codes of behaviour that make up an organisation's culture. These may support or undermine gender equality. They influence how people relate to each other, what ideas are acceptable, how people are expected to behave and what types of behaviours are rewarded. Changing organisational culture may include:

- Starting where there is momentum and energy and building from there
- Documenting and rewarding progress
- Creating a climate of open communication
- Prohibiting forms of dominance and subordination which inhibit full contribution.

Accountability means the mechanisms by which an organisation measures how far it is "walking the talk" in terms of mainstreaming gender equality in its projects and organisational structure. These may include:

- Rewarding individuals or teams promoting gender equality
- Setting annual targets for implementing the organisational gender strategy
- Including responsibility for promoting gender equality in job descriptions, workplans and performance assessments.

Gender equality capacity assessments

When assessing the technical capacity of individual staff, find out what they think about promoting gender equality. Assess whether they have the necessary attitude and skills to promote gender equality into their day-to-day work.

Find out what they know about concepts such as gender equality and women's empowerment. Check how familiar they are with organisational policies and procedures for promoting gender equality, such as HelpAge's Gender equality policy, Minimum standards for gender mainstreaming, and recruitment processes (see the Annex for more details). Also find out if they have the necessary skills and knowledge to implement these.

You can use questionnaires, surveys, individual tests, focus group discussions and interviews to assess people's capacity to promote gender equality.

A capacity assessment at organisational level means considering the policies, strategies and procedures that are in place to enable an organisation to fulfil its commitment to gender equality. The International Labour Organization's participatory gender audit [6] describes a systematic, participatory and gender-sensitive methodology for analysing how gender is being mainstreamed within an organisation. Assessing organisational gender equality capacity is a useful step towards improving the organisation's capacity to promote gender equality.

Aspects of the organisation to assess include:

- Strategic planning
- Programming and implementation (including gender-transformative approaches)
- Budgeting
- Knowledge management
- Communication
- Monitoring and evaluation
- Partnerships
- Advocacy activities
- Leadership

Remember

You can do a gender analysis of each aspect, using these areas of enquiry to find out about:

- Roles and responsibilities (division of labour)
- Access to and control over resources
- Bodily autonomy, violence and safety
- Knowledge and information
- Aspiration and participation
- Duty bearers institutions/benefits

Use these questions to find out:

- Who has which positions?
- Who is actively participating in strategy and project development?
- Who develops organisational budgets and prioritises expenditure?
- Who is benefiting from the organisation's resources?
- Who can contribute to organisational decision making and strategic direction?
- Is the organisation taking active steps to ensure the safety of women? For example, does it have a sexual harassment policy or gender equality policy?

Gender-sensitive indicators are also helpful at organisational level to measure progress towards gender equality commitments.

Quantitative and qualitative indicators

At organisational level, quantitative indicators may include:

- Numbers of women, men and people of other genders in leadership positions
- Numbers of women, men and people of other genders in paid positions compared with numbers in voluntary, unpaid positions
- Percentage of project funding proposals meeting gender minimum standards (at least gender-sensitive)
- Percentage of advocacy outputs for which a gender analysis has been carried out to inform the messaging
- Percentage of target countries demonstrating improved use of sex-, age- and disability-disaggregated data.

Qualitative indicators may include:

- Content/quality of the gender equality policy
- Quality/level of implementation of the gender equality policy
- Type and adequacy of budget reserved for organisational gender mainstreaming initiatives
- Type and level of participation of women in organisational strategic decision-making.

6. ILO, A Manual for Gender Audit Facilitators: The ILO participatory gender audit methodology, 2007

Section 6: Understanding participation

Learning objective: Understand the concept of participation.

Participation

Participation is a human right: the right of all people to engage in society and in decisions that affect their lives. Participation is closely linked to the concept of "voice". Strengthening the voices of older people is essential in enabling them to claim their rights, participate in development processes and lead dignified, healthy and secure lives.

There are different levels of participation. It can be helpful to think of these as a ladder or staircase. The different levels relate to the quality of participation. At the bottom, there is no participation. People have no opportunity to take any part in making decisions on issues that affect their lives. Each step of the staircase represents a higher level of participation. At the top are ownership and control. Climbing the staircase is not competitive. People do not have to step over each other to reach the top.

Increasing the level of participation is a political effort when it challenges oppression and discrimination, in particular of marginalised people such as women, older people, people with disabilities, indigenous people, LGBTI+ people, people from ethnic or religious minorities, children, adolescents, etc.

Ladder of participation

Source: https://blogs.cornell.edu/gblblog/files/2016/09/STSS.Harts-Ladder-of-Participation-19tvldl.pdf
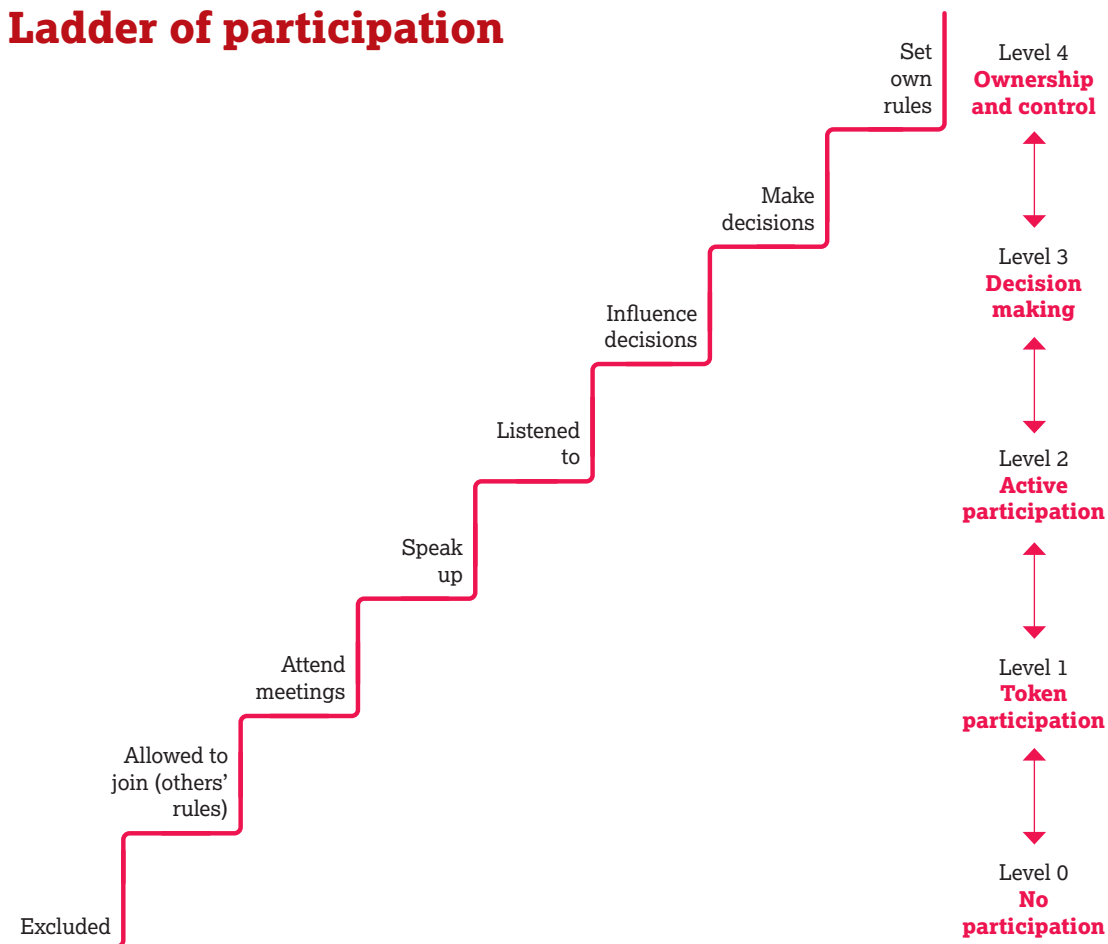
Section 7: Links between the gender analysis framework and 4-power framework

Learning objective: Understand the links between the gender analysis and 4-power framework.

Power is the ability to create or resist change. It can be held by individuals or groups. Power held by individuals relates to their autonomy, which can be less visible. Power held by groups relates to set structures and rules in any given context.

It is important to consider the power dynamics at play within any group you are working with. Inequality is usually based on a power imbalance. More powerful people restrict less powerful people's access to rights and resources.

Types of power

There are four types of power:

Power over	This is domination, often a negative use of "power over" other people. It can be exploitative and repressive. It can be used to control resources and opportunities for influencing decisions. However, "power over" does not have to be negative. It can just mean having access to and control of financial, physical and knowledge-based assets. It can also mean having control over other people to protect their interests.
Power to	This means being able to choose what to do and being able to do it. It includes resisting or creating change. It means being able to make decisions (within the household, community or more broadly) and to shape one's life.
Power within	This refers to the knowledge, capability, self-esteem and self-belief of any individual to enable them to bring about change in their life. It promotes personal dignity. It is often influenced by cultural or religious norms.
Power with	This is the ability of people with different interests to find common ground and act collectively, based on a sense of solidarity and mutual support, to build collective strength.

Source: VeneKlasen L, and Miller V, 'Power and empowerment', PLA Notes, 43: 39-41, 2002, and Comic Relief Maanda Initiative, *A framework for women and girls' empowerment: Guidance for Maanda applicants and grantees,* Comic Relief, 2014

Areas of enquiry and questions for gender analysis

When carrying out a gender analysis, use the answers to your questions across the areas of enquiry (gender analysis table in Section 2), to identify the prevailing power dynamics:

- Questions about roles and responsibilities (who does what?) relate to "power to" do something.

- Questions about access to and control over resources (who has what? who can use what and who has control over it?) relate to "power over" the resources and "power to" do something with them. Questions about social capital, such as having good friends or being a member of a club, relate to "power with".

- Questions about bodily autonomy, violence and safety relate to "power over" (one's own body or someone else's body), "power within" (having confidence and self-esteem) and "power to" do something or prevent something from happening.

- Questions about knowledge and information (who has information about what? who do they share this information with?) can relate to all four powers:
  - "power over" the information or knowledge as a resource
  - "power to" do something with the knowledge and information and decide who to share it with
  - "power within", because knowledge and information can increase self-esteem and confidence
  - "power with", when the information and knowledge is shared to benefit people more widely.
- Questions about aspirations and participation (who participates at what level and for what purpose?) relate to "power to" do what the person is aspiring to, "power with" by collaborating with others and finding solidarity, and "power within" by increasing confidence.

Voice and power

HelpAge has highlighted the importance of understanding the four powers through its work on voice and the development of its Voice framework. HelpAge's Voice framework includes five domains of voice activity, outlined below, each of which HelpAge is already engaged in within different contexts. Evidence from HelpAge and network members' work and broader activity on voice within development settings suggests these are all critical to strengthening older people's voices and to building "power over", "power to", "power within", and "power with". The domains and their related goals envision older women and men's voices being:

- **Engaged** "I am able and incentivised to take part in activity that strengthens my voice and my rights regardless of my identity, individual or group characteristics, or the context in which I live"
- **Informed and empowered** "I have information and knowledge related to my rights and entitlements and I have the resources and skills to claim these rights and raise my voice, including confidence and self-esteem"
- **Exercised and combined** "I have the opportunity and resources to meet with others, exercise my voice, and debate. We are able to identify our needs, consider solutions, and form a collective, legitimate and representative voice"
- **Transmitted and mobilised** "I have the opportunity to transmit my voice through a variety of channels and to join with others to amplify our voice, influence agendas, and create movements for change"
- **Heard** "My voice is heard and responded to through my active participation in decision-making processes through which I can effect change. My rights are realised and I have access to mechanisms with which I can hold power holders to account".

Surrounding the domains, the HelpAge's Voice framework also includes critical contextual factors that we know have a profound impact on the outcomes of voice-related activity. All voice-related activity takes place in highly complex contexts that range radically both between and within countries and groups. Cultural and social norms as well as political, environmental and physical contexts manifest themselves in power dynamics from the household to the national level which affect voice at all stages of life.

Power dynamics are also influenced by multiple and intersecting individual and group characteristics that change and accumulate across the life course and which affect how individuals experience key transition points – including those that people face as they move from being younger old to older old. This means that the effect of age on voice is never homogenous. Older age intersects in a unique way with gender and disability, in particular, as the interaction of discrimination or exclusion experienced as a result of these characteristics can markedly intensify disadvantage. We know that older women and older people with disabilities will always face more of a challenge to exercise their voices in all contexts and at all levels. These characteristics are therefore drawn out in the centre of HelpAge's Voice framework, reflecting the influence they have upon an individual or group's power and voice.

To be successful, interventions must analyse and address contextual factors and the effect of individual and group characteristics on voice, seeking to transform the power relations that underpin them.
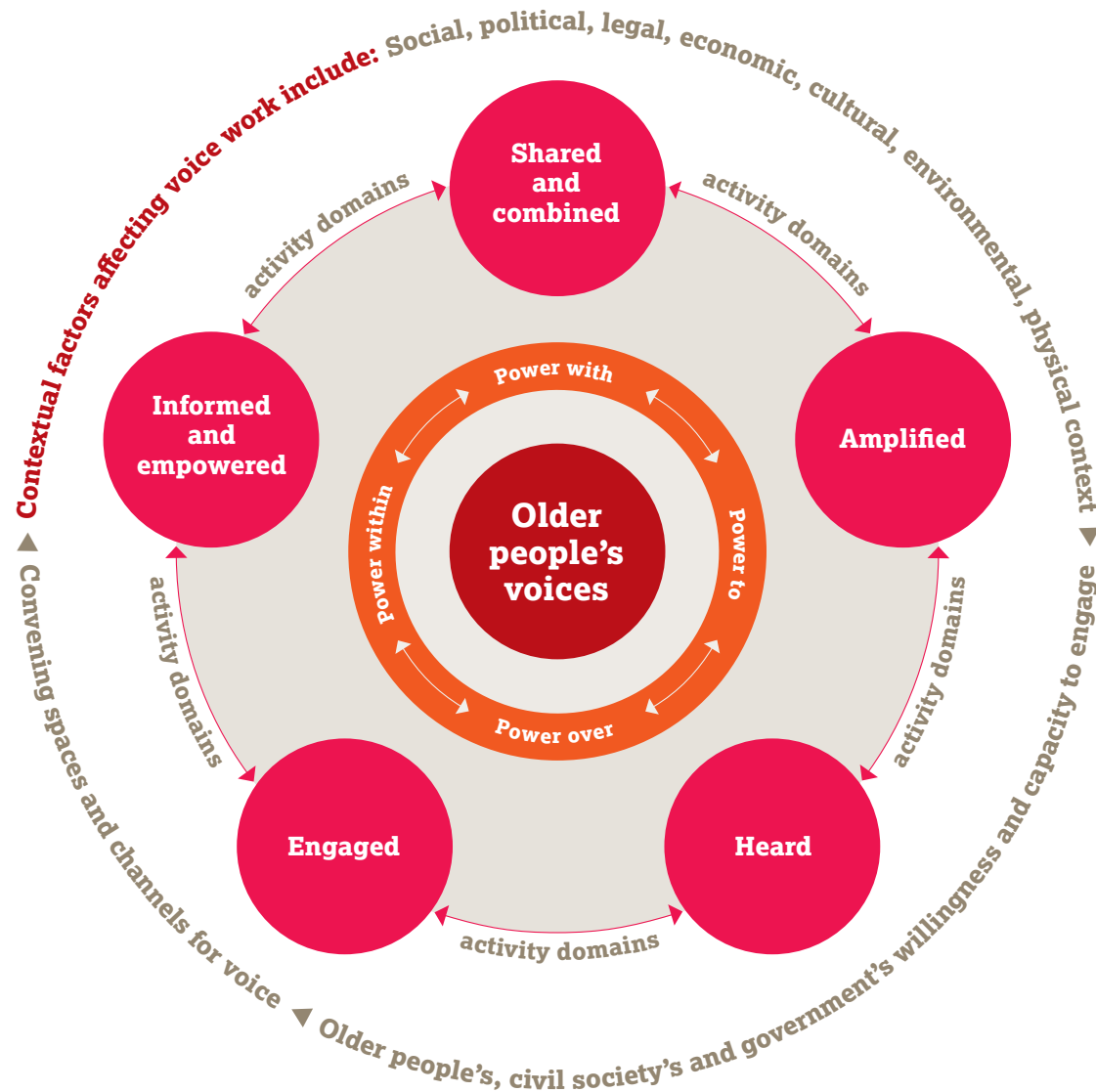
HelpAge's Voice framework is founded upon the assertion that older people's voices are strongest when all the domains of voice activity that it outlines are addressed, from ensuring older women and men are engaged in voice-related activity and are informed and empowered as individuals, to ensuring older people's voices are heard by power holders and that they can effect change. However, work on all these domains doesn't necessarily have to happen at the same time and the process of strengthening older people's voices should not be thought of as linear. Indeed, undertaking voice-related activity in any domain is never a linear, clean process. What is important is that how different domains interact with each other and their contexts is considered when designing interventions and that the implications of each area of work on the others is thought about.

On the other hand, analysis of critical contextual factors (those included in HelpAge's Voice framework but also others that might be relevant in the context you're working in) and the impact of age, gender, disability and other characteristics, must always take place when designing voice activity and inform how interventions seek to transform power relations. It should be noted in planning that these contexts and characteristics are likely to interact in diverse and unforeseeable ways throughout the project, creating opportunities as well as barriers to strengthening older women's and men's voices. Please refer to the Annex for more information.

Quiz

Try this quiz to check what you have learnt from this module. Answers at the end.

1. Gender mainstreaming means projects are about women:

☐ True

☐ False

2. Gender-sensitive means you only need to collect sex-disaggregated data:

☐ True

☐ False

3. To develop a gender-sensitive programme with interventions in different locations you need to:

☐ Carry out a gender analysis in only one location

☐ Pay attention to gender analysis findings from different locations

4. People who carry out a gender analysis:

☐ Need training beforehand

☐ Only need to be briefed on how to use gender analysis tools

5. It is the sole responsibility of the gender focal point to deal with gender issues in the project:

☐ Yes

☐ No

6. If a gender analysis is carried out at the start of the project cycle, the project will automatically be gender transformative:

☐ True

☐ False

7. There is no risk of any backlash against women taking part in a gender-sensitive project:

☐ True

☐ False

8. At programmatic level, which of the following elements is not part of gender mainstreaming:

☐ SADDD data disaggregation

☐ Gender-equality outcomes

☐ Project indicators that reflect anticipated benefits for each of women, men and people of other genders

☐ Gender-neutral budget planning

9. A gender-responsive budget should divide money and resources equally between women, men and people of other genders:

☐ True

☐ False

1 False; 2 False; 3 Pay attention in your gender analysis to the differences in locations; 4 Need training; 5 No, it is everyone's responsibility to support gender-related work; 6 False; 7 False: develop mitigation strategies based on risk assessment; 8 Gender-neutral budget planning; 9 False

Module 4
Gender analysis practical exercises

This module demonstrates how to carry out a gender analysis. It uses four case studies. Each case study is written up twice, the second time with highlighted text and notes showing:

Gender analysis of response:

- Reproductive/productive/community roles – highlighted in **PINK**
- Practical/strategic needs – highlighted in **GREEN**
- Level of participation – highlighted in **YELLOW**
- Gender-neutral/gender-sensitive/gender-transformative approach – highlighted in **PURPLE**
- Questions – highlighted in **BLUE**

Gender roles, needs and approaches

To apply a gender analysis, you need to determine:

- gender roles
- gender needs
- participation levels
- gender-neutral/gender-sensitive/gender-transformative approach
- where we make assumptions
- where we need to find out more about process and content.

Gender roles

Gender roles may be productive, reproductive or community:

Productive roles are activities carried out to secure goods or services for sale to enable people to survive. They include employment, farming and trading.

Reproductive roles are activities that keep families alive and well. They include childbearing, caring for family members and managing the home (such as fetching water and firewood). Reproductive roles are often manual, time-consuming and unpaid.

Community roles are activities that promote community cohesion. They include organising social events such as ceremonies and celebrations, arranging community improvements and serving on committees. Women's community roles are often an extension of their reproductive roles of mobilising, caring and providing, performed on a voluntary, unpaid basis. Men's community roles are often political and include decision-making. They are more often paid and associated with status and power.

With the exception of childbearing and breastfeeding, all these roles can be performed by both women and men. However, cultural and social norms often assign specific roles to either women or men, including in older age. Different values are attached to different roles. The hierarchy of roles and the way roles are distributed between women and men leads to unequal power relationships between women and men.

Gender needs

These can be practical or strategic:

Practical needs
- tend to be immediate and short-term
- unique to particular women, men or people of other genders

- relate to daily survival, such as food, housing, healthcare, water and income
- easily identifiable by women, men or people of other genders
- can be met through a combination of productive and reproductive activities, such as providing wells and fetching water, running health centres and caring for sick family members, selling goods at the market to earn money to feed the family and earning an income from employment to meet family expenses.

Addressing practical needs:
- involves women, men or people of other genders as recipients and perhaps participants
- can improve the condition of women's, men's or people of other genders' lives
- generally, does not alter existing roles and relations.

Strategic needs
- tend to be long-term
- common to almost all women, men or people of other genders
- for women, often relate to their disadvantaged position over the life course, subordination, lack of resources and education, vulnerability to poverty and violence, etc
- basis of disadvantage and potential for change not always identifiable by women, men or people of other genders
- can be addressed by consciousness-raising, increasing self-confidence, education, strengthening movements, political mobilisation.

Addressing strategic needs:
- involves women, men or people of other genders as agents of change or enables them to become agents of change
- can improve the position of women or people of other genders in society through transformation of unequal power relations.

Gender approaches

Approaches may be gender-neutral, gender-sensitive or gender-transformative.

Gender-neutral approach
- Some gender and age analysis is done, but used as background information
- Gender- and age-disaggregated data is presented but not analysed
- Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are not included
- Resources are not allocated to activities promoting gender equality.

Gender-sensitive approach
- Gender and age analysis is done
- Gender is apparent in the language. Gender- and age-disaggregated data is used and analysed
- Specific outcomes and activities that acknowledge the different needs and capacities of women, men and people of other genders are included
- The intervention is more likely to focus on their practical or immediate needs.

Gender-transformative approach
- Both quantitative and qualitative gender and age analysis is done
- Specific outcomes seek to transform unequal power relations between women, men and people of other genders through changes in roles and status, and redistribution of resources
- Gender equality is promoted as a major goal
- The intervention aims to challenge existing norms and attitudes that reinforce gender role stereotypes
- Gender is built into the response and the causes of inequality are addressed head on.

Case study 1: Humanitarian action

Support to marginalised women affected by floods: Project summary

During recent heavy rainfall in Sri Lanka, a number of villages were buried under mudslides and flooded from overflowing rivers. Thousands of people were evacuated to the closest safe town where an evacuation centre was set up.

Local authorities and civil society organisations, including older people's associations and disabled people's organisations, collaborated to form a steering committee to arrange support for excluded affected groups. The steering committee called on various women's groups, including older women and women with disabilities, to form an evacuee managing committee and a task force, consisting of their members, to run the evacuation centre and ensure the wellbeing of the evacuees. Their responsibilities included:

- finding family members who had become separated from each other
- distributing food and clothes
- running activities and lessons for children
- running support groups to provide psychosocial peer support
- arranging health checks and treatment.

The evacuee managing committee received a fixed budget, set by the steering committee, to use as they saw fit. The managing committee also assigned responsibilities to task force members.

The steering committee also set up a rescue, rehabilitation and planning committee run by male members of various community groups, including older people's associations and disabled people's organisations. The committee was tasked with:

- visiting affected areas helping to organise rescue efforts
- talking to village and religious leaders, local authorities and affected household heads to assess the need for assistance
- planning how to help communities rebuild their lives and minimise the long-term effects of the disaster
- developing a disaster risk reduction strategy to avoid future extensive loss of life and homes.

The rescue, rehabilitation and planning committee received a budget based on recommendations by its main members. The budget included a daily allowance to cover the travel costs of committee members, and a very small salary for members according to their responsibilities. It chose a senior management team and assigned tasks to the rest of the members according to their expertise and interests.

Both committees reported to the steering committee on a bi-weekly basis. The steering committee instructed the two committees to make whatever changes were deemed necessary.

The rescue, rehabilitation and planning committee produced a report on its findings and recommendations to the steering committee and local authorities, who passed it on to various civil society organisations including women's groups, older people's associations and disabled people's organisations.

Once the disaster risk reduction strategy was signed off by the steering committee and local authorities, it was published and disseminated to appropriate civil society organisations to incorporate into their organisational planning.

Support to marginalised women affected by floods: Project summary

During recent heavy rainfall in Sri Lanka, a number of villages were buried under mudslides and flooded from overflowing rivers. Thousands of people were evacuated to the closest safe town where an evacuation centre was set up.

Local authorities and civil society organisations, including older people's associations and disabled people's organisations, collaborated to form a steering committee to arrange support for excluded affected groups. The steering committee called on various women's groups, including older women and women with disabilities, to form an evacuee managing committee and a task force, consisting of their members, to run the evacuation centre and ensure the wellbeing of the evacuees. Their responsibilities included:

- finding family members who had become separated from each other
- distributing food and clothes
- running activities and lessons for children
- running support groups to provide psychosocial peer support
- arranging health checks and treatment.

The evacuee managing committee received a fixed budget, set by the steering committee, to use as they saw fit. The managing committee also assigned responsibilities to task force members.

The steering committee also set up a rescue, rehabilitation and planning committee run by male members of various community groups, including older people's associations and disabled people's organisations. The committee was tasked with:

- visiting affected areas helping to organise rescue efforts
- talking to village and religious leaders, local authorities and affected household heads to assess the need for assistance
- planning how to help communities rebuild their lives and minimise the long-term effects of the disaster
- developing a disaster risk reduction strategy to avoid future extensive loss of life and homes.

The rescue, rehabilitation and planning committee received a budget based on recommendations by its main members. The budget included a daily allowance to cover the travel costs of committee members, and a very small salary for members according to their responsibilities. It chose a senior management team and assigned tasks to the rest of the members according to their expertise and interests.

Both committees reported to the steering committee on a bi-weekly basis. The steering committee instructed the two committees to make whatever changes were deemed necessary.

The rescue, rehabilitation and planning committee produced a report on its findings and recommendations to the steering committee and local authorities, who passed it on to various civil society organisations including women's groups, older people's associations and disabled people's organisations.

Once the disaster risk reduction strategy was signed off by the steering committee and local authorities, it was published and disseminated to appropriate civil society organisations to incorporate into their organisational planning.

Margin annotations

Which women were in leadership positions?
BLUE

Were women consulted?
BLUE

High level of participation (making decisions)
YELLOW

Reproductive and (unpaid?) community roles
PINK

Were women consulted?
BLUE

Which women were assigned to which tasks?
BLUE

Paid community roles
PINK

High level of participation (making decisions, set own rules)
YELLOW

Who was in leadership positions? Who did what tasks?
BLUE

Reproductive/productive/community roles
PINK

Practical/strategic needs
GREEN

Level of participation
YELLOW

Gender-neutral/gender-sensitive/gender-transformative approach
PURPLE

Questions
BLUE

Additional analysis: differences between processes for women's and men's committees

- Men were consulted about the budget for their tasks. Women were assigned a fixed budget without their input.

- Men received a per diem and salaries (even if very small). Women were not paid for their work.

- Men were in charge of fact-finding. Women were not involved in fact-finding or providing validation from the evacuees in their care.

- Men interviewed household heads. Household heads could mostly be men who might not identify the specific needs of women or younger household members. The responses of women heads of households might be influenced by the fact they were being interviewed by men. Findings might be interpreted and recommendations made from a male perspective.

- All the information gathered sat with the steering committee which chose what information to share with whom and when. Findings and recommendations were potentially not validated by women as the women's committee was not asked to provide any feedback.

At an organisational level, this project was mostly gender-neutral. Although women ran the evacuation centre with a high degree of autonomy, the design and set-up of the project reinforced gender-unequal structures and potentially undermined efforts to respond to women's needs, both practical (expressed by male heads of households or interviews with men) and strategic (met through unpaid community and reproductive responsibilities by the women's committee only).

From a power perspective, women participating in the evacuation managing committee had "power to" run the evacuation centre (within the budget allocated) and make decisions on management, priorities, etc. They had (limited) "power over" resources and the people in their care, and over the task force by allocating tasks. We do not know how this management and decision-making power was distributed among the different civil society organisations (older people's associations, disabled people's organisations, other women's organisations) but the collaboration reflects "power with". If management and task distribution were fairly inclusive, they would have supported some "power within".

Overall, within their area of responsibility, women may have had a good level of power. However, considering the lack of equal pay, consultation on the budget, potentially poor validation of needs assessments carried out by men, and lack of input into recommendations, their level of power was lower than men's.

At a programmatic level, we do not have enough information to determine what sorts of power lay with women or men, or how gender-sensitive or gender-transformative the project was. However, our analysis shows that we might have concerns about how well the project responded to the needs of women.

Case study 2: Humanitarian action

Improving the psychosocial wellbeing and rehabilitation of older refugees: Project summary

The objectives of the project are to:

- improve the psychosocial wellbeing of 3,200 older refugees and their dependants
- initiate the rehabilitation of 2,400 older refugees and their dependants.

HelpAge surveyed the needs of over 1,000 older refugees (60 per cent women, 40 per cent men). Of those interviewed, 78 per cent exhibited signs of distress ranging from emotional instability to cognitive, behavioural and relationship problems. Also, 50 per cent complained of a lack of livelihood opportunities and 60 per cent identified income as a priority need.

Older women, in particular, often shoulder household responsibilities and care for children (60 per cent of the women surveyed). At the same time, many suffer from chronic health conditions and mobility problems. The combination of their responsibilities and vulnerabilities compound the psychological strain of camp life.

Response:

- Establish 60 older people's clubs (30 for women and 30 for men).
- Train 500 older people (250 women and 250 men) as peer counsellors across three camps to recognise symptoms of trauma and stress and learn how to alleviate these through talking therapies.
- Support the 500 peer counsellors to offer individual and group counselling to 3,200 older refugees through home visits and organised sessions in existing meeting spaces in the camps. Women will mostly do the home visits to support women who cannot come to the group sessions because of their care responsibilities or if they do not feel confident in groups. Men will run many of the group sessions in anticipation that they might have to deal with behavioural issues (e.g. aggression). Counsellors will be paid an incentive.
- Organise a variety of cultural and sports activities in the camps to relieve stress and strengthen social cohesion and trust. These will be linked to the older people's clubs. It is anticipated that men will mostly do sports such as football and fitness training, and women will do dancing and arts activities such as drawing and poetry-writing. There will be quarterly competitive games against teams from surrounding villages and towns, and an annual exhibition of women's drawings and poetry.
- Provide start-up capital to members of older people's clubs to set up small businesses, following market assessments and consultation with other interested parties. It is anticipated that 65 per cent of older entrepreneurs will be men and 35 per cent will be women, based on their availability and market demands.
- Provide tailored training to older entrepreneurs in their chosen business activity as well as general business training.
- Arrange for project staff to mentor older entrepreneurs throughout the three-year project through regular visits.

Additional information on the budget:

- The budget line for counselling activities is derived from counsellors' salaries (women and men receive the same salary) and stationery for record-keeping.
- The budget line for cultural and sports activities is 70 per cent for sports equipment and 30 per cent for writing and drawing materials.

The majority of project staff are men, partly because of availability, and partly because it seems that more men than women in the refugee population will need business support or psychosocial support to deal with behavioural or relationship problems.

Improving the psychosocial wellbeing and rehabilitation of older refugees: Project summary

The objectives of the project are to:

- improve the psychosocial wellbeing of 3,200 older refugees and their dependants
- initiate the rehabilitation of 2,400 older refugees and their dependants.

HelpAge surveyed the needs of over 1,000 older refugees (60 per cent women, 40 per cent men). Of those interviewed, 78 per cent exhibited signs of distress ranging from emotional instability to cognitive, behavioural and relationship problems. Also, 50 per cent complained of a lack of livelihood opportunities and 60 per cent identified income as a priority need.

> How do these figures relate to women relative to men?
> **BLUE**

Older women, in particular, often shoulder household responsibilities and care for children (60 per cent of the women surveyed). At the same time, many suffer from chronic health conditions and mobility problems. The combination of their responsibilities and vulnerabilities compound the psychological strain of camp life.

> Reproductive role
> **PINK**

> Practical needs
> **GREEN**

Response:

- Establish 60 older people's clubs (30 for women and 30 for men).

> If 60% women and 40% men, why equal number of clubs for women and men?
> **BLUE**

- Train 500 older people (250 men and 250 women) as peer counsellors across three camps to recognise symptoms of trauma and stress and learn how to alleviate these through talking therapies.

- Support the 500 peer counsellors to offer individual and group counselling to 3,200 older refugees through home visits and organised sessions in existing meeting spaces in the camps. Women will mostly do the home visits to support women who cannot come to the group sessions because of their care responsibilities or if they do not feel confident in groups. Men will run many of the group sessions in anticipation that they might have to deal with behavioural issues (e.g. aggression). Counsellors will be paid an incentive.

> No transport for home visits? No help with care?
> **PURPLE**

> Single-sex or mixed-sex groups?
> **BLUE**

- Organise a variety of cultural and sports activities in the camps to relieve stress and strengthen social cohesion and trust. These will be linked to the older people's clubs. It is anticipated that men will mostly do sports such as football and fitness training, and women will do dancing and arts activities such as drawing and poetry-writing. There will be quarterly competitive games against teams from surrounding villages and towns, and an annual exhibition of women's drawings and poetry.

> Listened to, or stereotyping?
> **YELLOW**

- Provide start-up capital to members of older people's clubs to set up small businesses, following market assessments and consultation with other interested parties. It is anticipated that 65 per cent of older entrepreneurs will be men and 35 per cent will be women, based on their availability and market demands.

> Equitable?
> **YELLOW**

> Practical needs
> **GREEN**

- Provide tailored training to older entrepreneurs in their chosen business activity as well as general business training.

- Arrange for project staff to mentor older entrepreneurs throughout the three-year project through regular visits.

> Women's strategic needs? Assumptions on roles and needs? Appropriate interaction?
> **PURPLE**

Additional information on the budget:

- The budget line for counselling activities is derived from counsellors' salaries (men and women receive the same salary) and stationery for record-keeping.

- The budget line for cultural and sports activities is 70 per cent for sports equipment and 30 per cent for writing and drawing materials.

The majority of project staff are men, partly because of availability, and partly because it seems that more men than women in the refugee population will need business support or psychosocial support to deal with behavioural or relationship problems.

> **Reproductive/productive/community roles**
> **PINK**

> **Practical/strategic needs**
> **GREEN**

> **Level of participation**
> **YELLOW**

> **Gender-neutral/gender-sensitive/gender-transformative approach**
> **PURPLE**

> **Questions**
> **BLUE**

Additional gender analysis

The project is inconsistently gender-sensitive. At times it is gender-neutral:

- There are some findings specifically on the situation of older women. However, there is no consistent sex-disaggregation of the psychological symptoms of women and men, which should influence the response. It is hinted that men might display challenging behaviour, as it is anticipated that male counsellors will run group counselling sessions.

- Some activities are planned for women and men in equal numbers, such as clubs and training as peer counsellors. However, this is not necessarily equitable, as there are more older women in the camp than men. In some cases, equal numbers favour men, such as support for livelihoods, based on assumptions about women's and men's availability and skills.

- Male and female peer counsellors will receive the same salary. However, women are expected to do most of the home visits without a corresponding budget line to cover travel expenses. This is a concern, considering their health and mobility challenges, safety and care responsibilities.

- An assumption seems to have been made that only men can deal with difficult situations i.e. aggressive behaviour in group work. Is this based on a stereotyped view of men as stronger and more authoritative? In any case, would this be the best approach to deal with aggression? Will the men be trained? If so, why not women too?

- Plans for cultural and sports activities also reflect gender-stereotypes. More importantly, there is more investment in men's activities than women's.

- Using market demands to identify livelihoods activities potentially reinforces lower-paid jobs for women. Anticipating engaging fewer older women because of their challenges (care, health, etc) does not support a gender-transformative approach, which would question and address such challenges.

From a power perspective, women appear to have the same or similar "power to" participate in peer counselling, earn an income and have an outlet for their creativity and coping strategies as men. This will have a positive impact on their "power within" and their opportunity to collaborate with others ("power with") through counselling, arts and, potentially, livelihoods activities. There is not enough information to determine women's level of "power over" their own decisions about the process, such as home visits or centre-based group counselling, type of livelihood based on market assessment, or what to do with their earnings.

Case study 3: Income security

Women as agents of change in Latin America: Project summary

Everyone has the same right to health, decent work, rest and leisure, and social protection. Many older women are denied these basic rights, and the power to make life decisions. The Social Development Goals (SDGs) commit governments and other stakeholders to a rights-based approach that includes older women, who are often at the centre of their homes and communities.

However, despite the economic empowerment of women being discussed more frequently in the international political agenda, the role of older women, their rights, needs and priorities are largely absent from these discussions. The connection must be established that gender equality will only become a reality when people of all genders and ages can make meaningful decisions and have control over their rights.

Older women in low- and middle-income countries are boosting economies by making substantial contributions through domestic work and unpaid care for their families and communities. In the poorest countries, many older women also do paid work to support themselves and their households. The absence of unpaid care work in traditional economic thinking, and the way in which this reinforces unequal power relations between women and men, can have consequences for the work that older women do and their access to assistance and income.

Additionally, the lack of visibility of older women in the economic empowerment agenda has meant that they are not included in efforts to address systemic gender inequality. The traditional support of the family and the community is constantly changing, which means that policy makers must urgently recognise the economically significant role of older women in low- and middle-income countries. While the SDGs recognise the need to consider women of all ages, they are not explicit about what this means for older women. Within the frameworks of policies on the economic empowerment of women, older women are not yet recognised as active contributors to development.

The world is ageing at an unprecedented rate. By 2030, the number of people aged 60 and over will be 1.4 billion. On average, women live five years longer than men, but they do not necessarily live their later years in good health or with adequate resources. In Latin America, the older population is growing faster than the rest of the population. HelpAge's Global AgeWatch estimates that by 2050, 24 per cent of the population of El Salvador, 21 per cent in the Dominican Republic and 18 per cent in Colombia will be aged over 60 years.

Older women have rights and aspirations, and may need support to guarantee their wellbeing, regardless of their contributions to society. The structural gender inequalities throughout life and the change in family and social structures show that this is often not the case. Income security, access to medical care, long-term care systems that support caregivers and those in their care, inclusive decision-making, legal systems that guarantee rights and positive social attitudes towards ageing, are all crucial so that older women can live fully. In Latin America, not enough is being done to make visible and guarantee the rights of older women.

Case study 3: Income security

Case study

To advocate for these rights, a political and technical response involving national and local governments, civil society, the media and women's organisations is required. The proposal therefore focuses on developing different fundamental axes that will determine how to position the older women's rights agenda in Colombia, El Salvador and the Dominican Republic.

The main strategies for achieving this are: 1) the development of evidence and data that allow decision-making and prioritisation of interventions to assist older women; 2) the generation of leadership and capacities that will provide evidence to strategically advocate for older women's rights and raise their voices; 3) support to the organisational, associative and network building of women's entities; 4) the development of a communications, mobilisation and visibility plan.

Overall objective: Older women in Colombia, El Salvador and the Dominican Republic are recognised as equal economic, political and social actors, and their rights are respected and protected.

Specific objective: Generate evidence and strengthen the capacity of local organisations and older community leaders to advocate for national, local and community strategies, policies and plans to include the perspective and needs of older women.

Expected result: Women in Colombia, El Salvador and the Dominican Republic implement advocacy strategies to raise the situation of discrimination and violence against older women, ensuring that the problem is positioned at local and national levels and that innovative measures are taken to guarantee the rights and necessary services for older women to effectively enjoy their rights.

Outcome 1: Collection of quantitative and qualitative evidence to measure, produce, systematise, prioritise and analyse empirical information about the political and economic discrimination experienced by older women in Colombia, El Salvador and the Dominican Republic. Different intersecting identities will be considered, such as ethnicity, sexual orientation and gender identity, disability and rural/urban setting.

Outcome 2: Generation of capacity of at least 400 older women and other people per country, in Colombia, El Salvador and the Dominican Republic to advocate for the rights of older women.

Outcome 3: Strengthen the organisational, partnership and networking capacities of women taking part in the project in Colombia, El Salvador and the Dominican Republic.

Outcome 4: Development of an accompanying communications, mobilisation and visibility strategy.

Women as agents of change in Latin America: Project summary

Everyone has the same right to health, decent work, rest and leisure, and social protection. Many older women are denied these basic rights, and the power to make life decisions. The Social Development Goals (SDGs) commit governments and other stakeholders to a rights-based approach that includes older women, who are often at the centre of their homes and communities.

Practical needs
GREEN

Participation
– women consulted
YELLOW

However, despite the economic empowerment of women being discussed more frequently in the international political agenda, the role of older women, their rights, needs and priorities are largely absent from these discussions. The connection must be established that gender equality will only become a reality when people of all genders and ages can make meaningful decisions and have control over their rights.

Gender transformative
PURPLE

Older women in low- and middle-income countries are boosting economies by making substantial contributions through domestic work and unpaid care for their families and communities. In the poorest countries, many older women also do paid work to support themselves and their households. The absence of unpaid care work in traditional economic thinking, and the way in which this reinforces unequal power relations between women and men, can have consequences for the work that older women do and their access to assistance and income.

Productive, reproductive and (unpaid?) community roles
PINK

Additionally, the lack of visibility of older women in the economic empowerment agenda has meant that they are not included in efforts to address systemic gender inequality. The traditional support of the family and the community is constantly changing, which means that policy makers must urgently recognise the economically significant role of older women in low- and middle-income countries. While the SDGs recognise the need to consider women of all ages, they are not explicit about what this means for older women. Within the frameworks of policies on the economic empowerment of women, older women are not yet recognised as active contributors to development.

Strategic needs
GREEN

The world is ageing at an unprecedented rate. By 2030, the number of people aged 60 and over will be 1.4 billion. On average, women live five years longer than men, but they do not necessarily live their later years in good health or with adequate resources. In Latin America, the older population is growing faster than the rest of the population. HelpAge's Global AgeWatch estimates that by 2050, 24 per cent of the population of El Salvador, 21 per cent in the Dominican Republic and 18 per cent in Colombia will be aged over 60 years.

How many women?
BLUE

Older women have rights and aspirations, and may need support to guarantee their wellbeing, regardless of their contributions to society. The structural gender inequalities throughout life and the change in family and social structures show that this is often not the case. Income security, access to medical care, long-term care systems that support caregivers and those in their care, inclusive decision-making, legal systems that guarantee rights and positive social attitudes towards ageing, are all crucial so that older women can live fully. In Latin America, not enough is being done to make visible and guarantee the rights of older women.

Strategic and practical needs
GREEN

Reproductive/productive/community roles
PINK

Practical/strategic needs
GREEN

Level of participation
YELLOW

Gender-neutral/gender-sensitive/gender-transformative approach
PURPLE

Questions
BLUE

Case study

To advocate for these rights, a political and technical response involving national and local governments, civil society, the media and women's organisations is required. The proposal therefore focuses on developing different fundamental axes that will determine how to position the older women's rights agenda in Colombia, El Salvador and the Dominican Republic.

Strategic needs
GREEN

The main strategies for achieving this are: 1) the development of evidence and data that allow decision-making and prioritisation of interventions to assist older women; 2) the generation of leadership and capacities that will provide evidence to strategically advocate for older women's rights and raise their voices; 3) support to the organisational, associative and network building of women's entities; 4) the development of a communications, mobilisation and visibility plan.

Will these steps involve consultation with women?
BLUE

Overall objective: Older women in Colombia, El Salvador and the Dominican Republic are recognised as equal economic, political and social actors, and their rights are respected and protected.

Gender transformative
PURPLE

Specific objective: Generate evidence and strengthen the capacity of local organisations and older community leaders to advocate for national, local and community strategies, policies and plans to include the perspective and needs of older women.

High level of participation (influencing decisions)
YELLOW

Expected result: Women in Colombia, El Salvador and the Dominican Republic implement advocacy strategies to raise the situation of discrimination and violence against older women, ensuring that the problem is positioned at local and national levels and that innovative measures are taken to guarantee the rights and necessary services for older women to effectively enjoy their rights.

Gender transformative
PURPLE

Outcome 1: Collection of quantitative and qualitative evidence to measure, produce, systematise, prioritise and analyse empirical information about the political and economic discrimination experienced by older women in Colombia, El Salvador and the Dominican Republic. Different intersecting identities will be considered, such as ethnicity, sexual orientation and gender identity, disability and rural/urban setting.

Outcome 2: Generation of capacity of at least 400 older women and other people per country, in Colombia, El Salvador and the Dominican Republic to advocate for the rights of older women.

High level of participation (speaking up, decision making)
YELLOW

Outcome 3: Strengthen the organisational, partnership and networking capacities of women taking part in the project in Colombia, El Salvador and the Dominican Republic.

Outcome 4: Development of an accompanying communications, mobilisation and visibility strategy.

Reproductive/productive/ community roles
PINK

Practical/strategic needs
GREEN

Level of participation
YELLOW

Gender-neutral/gender-sensitive/gender-transformative approach
PURPLE

Questions
BLUE

Case study 4: Income security

Social protection for older people in Nairobi, Kenya: Project summary

The project aims to improve systems and access to social protection for marginalised older people in urban areas of Kenya. There are three main objectives:

- Access to the Inua Jami 70+ (IJ70+) social pension programme for older people in project locations is more effective, appropriate and equitable.

- Accountability of targeted stakeholders involved in the execution of the IJ70+ programme, in particular the Government of Kenya, will be strengthened.

- Targeted state and non-state actors of the social protection sector will demonstrate improved capacity to implement inclusive age-, gender- and disability-friendly programmes in Kenya.

The training for staff designing the proposal covered aspects such as gender in communication materials, gender-sensitive language and integrating gender aspects into each phase of the project cycle. Three clusters of gender-specific activities were:

- **Equitable access** In view of gender-related barriers identified in accessing the IJ70+, practical support will be provided to eligible older women to overcome the barriers, particularly in relation to information, communication and rights awareness. For example, supporting older women to obtain or renew identification documents which are required to access the IJ70+.

- **Learning** Increasing knowledge of the intersections of gender, age and urbanisation. Gender dimensions will be included in the research elements of the project including in the baseline, vulnerability assessments and impact assessment of the IJ70+ on socio-economic and household dynamics.

- **Capacity building** Provision of gender-specific capacity building for HelpAge and implementing partners. For example, a training budget will be allocated towards the development of organisational knowledge on gender mainstreaming and gender-transformative programming.

  Gender will also be mainstreamed into empowerment activities benefiting older people's associations and older citizen monitoring groups.

The main interventions are:

- Awareness and information session about social protection, older people's rights, Inua Jami 70+ and claims mechanisms (e.g. beneficiary welfare committees); training of trainers on complaints and grievance procedures, elaboration of a charter of rights and responsibilities towards pension recipients; distribution of forms (including claims forms) and claims registers in the targeted communities, legal and administrative assistance through beneficiary welfare committees (e.g. obtaining or replacing ID documents and biometric cards).

- Radio campaigns, *barazas* (community meetings) and other consultation and dialogue mechanisms adapted to older people, taking into account any constraints related to gender or disability, training and operational costs of older citizen monitoring groups, capacity building for beneficiary welfare committees as official platforms for feedback.

- Digital data collection through surveys, data analysis, local and national advocacy actions including presentation of recommendations, capacity building for Social Assistance Unit/National Safety Net Programme in relation to complaints and grievances, learning and knowledge dissemination about targeting and innovation for social accountability in social protection, longitudinal study, seminars and workshops.

Case study 4: Income security

Case study

Power dynamics and discrimination against women persist, and ageing policies mostly fail to be gender-responsive in relevant ways. In social protection programmes, gender is rarely an intentional, preferred or understood programming lens, even though the socio-economic status of women throughout their lives keeps them away from contributory social protection systems, and the needs of women and men differ in older age.

The UNDP *Kenya Human Development Report (2015)* explains that, in spite of strong female participation in the labour market in Kenya, only 19.3 per cent of women have a salaried job, whereas 77 per cent are independent workers (i.e. they manage a micro-enterprise or work in the informal sector). In this context, contributory pension schemes can aggravate gender inequalities.

Cash transfers can also have adverse effects on older people, in particular, older women. Older women are more likely to be expected to share the cash they receive or use it for the household or other people. They are more likely to be denied full control of their resources. Some of these risks and negative effects may even relate to gender-based violence.

The positive effects of social pensions on gender equality are, however, well documented (e.g. rebalancing of intra-familiar or household decision-making and power dynamics, improved nutritional status, more limited social isolation), although to a lesser extent in Kenya. Therefore, gender-specific vulnerability studies and a gender analysis (adapted from the existing HelpAge tool) will be conducted in the inception phase of the intervention. Observations and findings from these studies will be used to inform activities and their targeting. Following the "Do no harm" principle, a specific mapping of the differentiated needs of older people of different genders will be conducted through community-level participatory methods.

Envisaged partnerships

HelpAge and its partners will steer and manage the project. They will ensure the mobilisation of existing community groups (50 beneficiary welfare committees, 10 older people's associations and 20 older citizen monitoring groups), as well as the policy dialogue with and advocacy towards the Government of Kenya, its agencies and the public mechanisms concerned. A total of 20,000 older people (8,000 men and 12,000 women aged 70 and over in the targeted locations) will be encouraged to take part in project activities through consultation and citizen monitoring mechanisms.

Social protection for older people in Nairobi, Kenya: Project summary

The project aims to improve systems and access to social protection for marginalised older people in urban areas of Kenya. There are three main objectives:

Practical needs GREEN

- Access to the Inua Jami 70+ (IJ70+) social pension programme for older people in project locations is more effective, appropriate and equitable.

Gender sensitive PURPLE

- Accountability of targeted stakeholders involved in the execution of the IJ70+ programme, in particular the Government of Kenya, will be strengthened.

- Targeted state and non-state actors of the social protection sector will demonstrate improved capacity to implement inclusive age-, gender- and disability-friendly programmes in Kenya.

Gender transformative PURPLE

The training for staff designing the proposal covered aspects such as gender in communication materials, gender-sensitive language and integrating gender aspects into each phase of the project cycle. Three clusters of gender-specific activities were:

Gender sensitive PURPLE

- **Equitable access** In view of gender-related barriers identified in accessing the IJ70+, practical support will be provided to eligible older women to overcome the barriers, particularly in relation to information, communication and rights awareness. For example, supporting older women to obtain or renew identification documents which are required to access the IJ70+.

Strategic needs GREEN

- **Learning** Increasing knowledge of the intersections of gender, age and urbanisation. Gender dimensions will be included in the research elements of the project including in the baseline, vulnerability assessments and impact assessment of the IJ70+ on socio-economic and household dynamics.

Gender transformative PURPLE

- **Capacity building** Provision of gender-specific capacity building for HelpAge and implementing partners. For example, a training budget will be allocated towards the development of organisational knowledge on gender mainstreaming and gender-transformative programming.

Gender sensitive and transformative PURPLE

  Gender will also be mainstreamed into empowerment activities benefiting older people's associations and older citizen monitoring groups.

Gender transformative PURPLE

The main interventions are:

- Awareness and information session about social protection, older people's rights, Inua Jami 70+ and claims mechanisms (e.g. beneficiary welfare committees); training of trainers on complaints and grievance procedures, elaboration of a charter of rights and responsibilities towards pension recipients; distribution of forms (including claims forms) and claims registers in the targeted communities, legal and administrative assistance through beneficiary welfare committees (e.g. obtaining or replacing ID documents and biometric cards).

Strategic needs GREEN

Active participation – inclusive approach to the intervention's tools/ mechanisms/tools YELLOW

- Radio campaigns, *barazas* (community meetings) and other consultation and dialogue mechanisms adapted to older people, taking into account any constraints related to gender or disability, training and operational costs of older citizen monitoring groups, capacity building for beneficiary welfare committees as official platforms for feedback.

- Digital data collection through surveys, data analysis, local and national advocacy actions including presentation of recommendations, capacity building for Social Assistance Unit/National Safety Net Programme in relation to complaints and grievances, learning and knowledge dissemination about targeting and innovation for social accountability in social protection, longitudinal study, seminars and workshops.

continued over

Reproductive/productive/ community roles PINK

Practical/strategic needs GREEN

Level of participation YELLOW

Gender-neutral/gender- sensitive/gender- transformative approach PURPLE

Questions BLUE

Case study

Power dynamics and discrimination against women persist, and ageing policies mostly fail to be gender-responsive in relevant ways. In social protection programmes, gender is rarely an intentional, preferred or understood programming lens, even though the socio-economic status of women throughout their lives keeps them away from contributory social protection systems, and the needs of women and men differ in older age.

The UNDP *Kenya Human Development Report (2015)* explains that, in spite of strong female participation in the labour market in Kenya, only 19.3 per cent of women have a salaried job, whereas 77 per cent are independent workers (i.e. they manage a micro-enterprise or work in the informal sector). In this context, contributory pension schemes can aggravate gender inequalities.

Productive roles
PINK

Cash transfers can also have adverse effects on older people, in particular, older women. Older women are more likely to be expected to share the cash they receive or use it for the household or other people. They are more likely to be denied full control of their resources. Some of these risks and negative effects may even relate to gender-based violence.

What risk mitigation measures will be put in place?
BLUE

The positive effects of social pensions on gender equality are, however, well documented (e.g. rebalancing of intra-familiar or household decision-making and power dynamics, improved nutritional status, more limited social isolation), although to a lesser extent in Kenya. Therefore, gender-specific vulnerability studies and a gender analysis (adapted from the existing HelpAge tool) will be conducted in the inception phase of the intervention. Observations and findings from these studies will be used to inform activities and their targeting. Following the "Do no harm" principle, a specific mapping of the differentiated needs of older people of different genders will be conducted through community-level participatory methods.

Gender transformative
PURPLE

Gender sensitive
PURPLE

Participation of local community members in needs mapping
YELLOW

Envisaged partnerships

HelpAge and its partners will steer and manage the project. They will ensure the mobilisation of existing community groups (50 beneficiary welfare committees, 10 older people's associations and 20 older citizen monitoring groups), as well as the policy dialogue with and advocacy towards the Government of Kenya, its agencies and the public mechanisms concerned. A total of 20,000 older people (8,000 men and 12,000 women aged 70 and over in the targeted locations) will be encouraged to take part in project activities through consultation and citizen monitoring mechanisms.

Active participation (consultation with older people)
YELLOW

Reproductive/productive/community roles
PINK

Practical/strategic needs
GREEN

Level of participation
YELLOW

Gender-neutral/gender-sensitive/gender-transformative approach
PURPLE

Questions
BLUE

Further reading
Annex

HelpAge

The following resources are stored on our internal Gender equality sharepoint site:

- Gender analysis: a checklist for producing advocacy outputs, 2019

- Gender analysis guide, 2014

- Gender equality policy, 2011

- Minimum standards for gender mainstreaming, 2014

- Sex, age and disability disaggregated data (SADDD): minimum standards and guidance, 2018

- Voice framework, 2019

Ageing and gender

- Ageing and Lifecourse, WHO
  https://www.who.int/ageing/ageism/en

- *Developing a life course approach to women's rights and gender equality,* 2018
  Age International and GADN
  https://gadnetwork.org/gadn-resources/2018/11/20/developing-a-life-course-approach-to-womens-rights-and-gender-equality

- *Sex and age matter: Improving humanitarian response in emergencies,* 2011, Feinstein International Center, Tufts University
  https://fic.tufts.edu/wp-content/uploads/sex-and-age-matter.pdf

- *VAWG Resource Guide: Brief on Violence Against Older Women,* 2016, World Bank, ICRW, GWI, IDB
  https://www.un.org/esa/socdev/documents/ageing/vawg_brief_on_older_women.pdf

Gender mainstreaming

- *A Manual for Gender Audit Facilitators: The ILO participatory gender audit methodology,* 2014, ILO
  https://www.ilo.org/wcmsp5/groups/public/---dgreports/---gender/documents/publication/wcms_187411.pdf

- Gender and UK Aid Direct, UK Aid
  https://www.ukaiddirect.org/learning/gender/

- *Gender Equality Capacity Assessment Tool,* 2014, UN Women
  https://www.unwomen.org/en/digital-library/publications/2014/6/gender-equality-capacity-assessment-tool

- *Gender Mainstreaming Resource Pack: A practical guide for programming,* 2010, Trocaire
  https://www.trocaire.org/resources/policyandadvocacy/gender-mainstreaming-resource-pack-practical-programming-guide

- *Gender Responsive Communication for Development: Guidance, Tools and Resources,* 2018
  UNICEF
  https://www.unicef.org/rosa/media/1786/file/Gender%20responsive%20communication%20for%20development%20.pdf

- *How to do Advocacy with a Gender Perspective: A guide and a checklist,* Diakonia
  https://www.diakonia.se/globalassets/documents/diakonia/how-we-work/gender-mainstreaming-toolbox/how-to-do-advocacy-with-a-gender-perspective-guide-and-checklist.pdf

- *Let's Speak Gender: 10 principles of gender responsive communications for development,* 2018, UNDP
  https://www.undp.org/content/dam/rbec/docs/10%20principles%20of%20gender-responsive%20communications.pdf

- *Transforming gender relations in an ageing world,* 2018, Warwick University
  https://www.helpage.org/blogs/professor-ann-stewart-31571/consider-inequalities-across-the-life-course-to-improve-older-womens-lives-1087/

Gender analysis

- *A Guide to Gender-Analysis Frameworks,* Oxfam Policy and Practice, 1999
  https://policy-practice.oxfam.org.uk/publications/a-guide-to-gender-analysis-frameworks-115397

- *Country gender equality profiles: Guidance note,* 2018, UN Women
  https://www.ungm.org/UNUser/Documents/DownloadPublicDocument?docId=793070

- *Gender analysis toolkit for health systems,* 2016, Jhpiego
  https://gender.jhpiego.org/analysistoolkit/

- *Gender Equality Index 2017,* European Institute for Gender Equality
  https://eige.europa.eu/publications/gender-equality-index-2017-measuring-gender-equality-european-union-2005-2015-report

- *Gender Equality Program Guidance and Toolkit: Engendering transformational change,* 2014, Save the Children
  https://resourcecentre.savethechildren.net/library/save-children-gender-equality-program-guidance-and-toolkit-engendering-transformational

- *Guide how to integrate disability gender assessments,* 2010, USAID
  https://www.usaid.gov/sites/default/files/Guide_How_Integrate_Disability_Gender_Assessments_2010.pdf

- *Integrating a gender perspective into statistics,* 2016, UNDESA
  https://unstats.un.org/unsd/demographic-social/Standards-and-Methods/files/Handbooks/gender/Integrating-a-Gender-Perspective-into-Statistics-E.pdf

- *Minimum set of gender indicators,* 2019, UNSD
  https://genderstats.un.org/files/Minimum%20Set%20indicators%202018.11.1%20web.pdf

- *Participatory methodology: Rapid care analysis,* 2013, Oxfam
  https://policy-practice.oxfam.org.uk/publications/participatory-methodology-rapid-care-analysis-302415

- Rapid Gender Analysis, Care International
  https://insights.careinternational.org.uk/in-practice/rapid-gender-analysis

Power analysis

- *Power Analysis: A practical guide,* 2013, Sida
  https://www.sida.se/contentassets/83f0232c5404440082c9762ba3107d55/power-analysis-a-practical-guide_3704.pdf

- *Power Analysis: Programme practice,* 2016, Christian Aid
  https://www.christianaid.org.uk/resources/about-us/power-analysis-programme-practice

Annex *continued*

Intersectionality
- *Intersectionality: A Tool for Gender and Economic Justice,* 2004, AWID
  https://www.awid.org/publications/intersectionality-tool-gender-and-economic-justice
- *Intersectionality Toolkit,* 2015, Iglyo
  https://www.iglyo.com/wp-content/uploads/2015/09/Inter-Toolkit.pdf

LBTQI+
- Key signposting and glossary, Stonewall
  https://www.stonewall.org.uk/sites/default/files/setting_up_lgbt_011.pdf
- *LGBT Ageing Review,* 2016, Williams Institute
  https://williamsinstitute.law.ucla.edu/wp-content/uploads/LGBT-Aging-A-Review.pdf
- Understanding Gender, Gender Spectrum
  https://www.genderspectrum.org/quick-links/understanding-gender/

Facilitation
- Energisers, SessionLab
  https://www.sessionlab.com/library/energiser
- *Facilitation tools for meetings and workshops,* Seeds for Change UK
  https://seedsforchange.org.uk/tools.pdf
- *Facilitating workshops briefing,* Seeds for Change UK
  https://www.seedsforchange.org.uk/facilwsh.pdf

Accessibility
- Creating Accessible Documents, AbilityNet
  https://abilitynet.org.uk/factsheets/creating-accessible-documents-0
- The Seven Principles of Universal Design, Rosemarie Rossetti
  https://www.udll.com/media-room/articles/the-seven-principles-of-universal-design/

Glossary

Age   Age refers to the time lived since birth.[7]

Ageism   Ageism means treating people unfairly because of their age.

Bisexual   Bisexual (or bi) refers to a person who has a romantic and/or sexual orientation towards more than one gender.[8]

Gender   Gender refers to the social differences ascribed to women and men, which are often central to the way in which people define themselves and are defined by others. Gender roles are learned, changeable over time, and variable within and between cultures. Gender often defines the duties, responsibilities, constraints, opportunities and privileges of women, men, girls, and boys in any context.

Gender binary   A classification system consisting of two genders, male and female.

Gender and age analysis   Provides qualitative information on gender differences and inequalities, and how they change across the life course. It helps us understand specific issues faced by older women and men, and older people of other genders, and how gender norms, roles and relations change with age.

Gender equality   Gender equality refers to the equal enjoyment of rights, responsibilities and opportunities of women, men, girls and boys.

Gender equity   Gender equity means distributing benefits and responsibilities fairly between women and men, according to their respective needs.

Gender identity   Refers to each person's deeply felt internal and individual experience of gender, which may or may not correspond with their sex assigned at birth.

Gender mainstreaming   Gender mainstreaming means integrating a gender equality perspective in policies, programmes and projects. Women, men and people of other genders have different needs and circumstances, including unequal access to and control over power, resources, human rights and institutions. The aim of gender mainstreaming is to take into account these differences when designing, implementing and evaluating policies, programmes and projects, so that they benefit women, men and people of other genders and do not increase inequality but enhance gender equality. Gender mainstreaming aims to solve sometimes hidden gender inequalities. It is therefore a tool for achieving gender equality.[9]

Gender neutral   Refers to interventions that do not address the differing needs and interests of women, men and people of other genders.

Gender sensitive   Refers to interventions that address the differing needs and interests of women, men and people of other genders. The response is more likely to focus on their practical or immediate needs.

Gender transformative   Refers to interventions that promote gender equality as one major goal (i.e. they explicitly address causes of gender inequality to transform unequal power relations between women, men and people of other genders, through changes in roles, status and through redistribution of resources).

Disability   Disability results from the interaction between persons with physical, mental, intellectual or sensory impairments and attitudinal and environmental barriers that hinders their full and effective participation in society on an equal basis with others.[10]

Glossary *continued*

Diversity Diversity refers to different values, attitudes, cultural perspectives, beliefs, ethnicities, nationalities, sexual orientation, gender identity, disability, health, social and economic status, skills, and other specific personal characteristics. Diversity characteristics vary from person to person and intersect, making each person unique. Respecting diversity means recognising and valuing those differences and creating a protective, inclusive, and non-discriminatory environment where everyone's rights are upheld.[11]

Gay Refers to a man who has a romantic and/or sexual orientation towards men. Also a generic term for lesbian and gay sexuality – some women who are orientated to women define themselves as gay rather than lesbian. Some non-binary people may also identify with this term.[12]

Heterosexual Refers to a man who has a romantic and/or sexual attraction towards women or to a woman who has a romantic and/or sexual orientation towards men.[13]

Homosexual This might be considered a more medical term used to describe someone who has a romantic and/or sexual orientation towards someone of the same gender. The term "gay" is now more generally used.[14]

Inclusion Inclusion means enabling all people to access their rights, and to freely and openly participate and be recognised in society without restrictions, limitations, or discrimination.

Intersectionality Different characteristics such as age, gender, ethnicity, disability, sexual orientation or location interact with each other, creating overlapping and interdependent systems of discrimination or disadvantage.

Intersex A term used to describe a person who may have the biological attributes of both sexes or whose biological attributes do not fit with societal assumptions about what constitutes male or female. Intersex people may identify as male, female or non-binary.[15]

Lesbian Refers to a woman who has a romantic and/or sexual orientation towards women. Some non-binary people may also identify with this term.

LGBTQI+ The acronym for lesbian, gay, bi, trans, queer, intersex and plus which includes any orientation not represented by those letters.

Life course A life course perspective is a way of reflecting on how to manage the risks or opportunities that people in every society face at key stages of life, in order to minimise and address the accumulation of disadvantage and inequality as people age.

Marginalisation The complex process of relegating specific people or groups of people to the lower or outer edge of society economically, politically, culturally and socially.

Non-binary An umbrella term for people whose gender identity doesn't sit comfortably with "man" or "woman". Non-binary identities are varied and can include people who identify with some aspects of binary identities, while others reject them entirely.[16]

Old age There is no global consensus on when old age begins. This is largely because people's perception of old age varies between individuals, communities and societies.[17] Old age may be regarded as a social construct rather than a chronological age. This is because populations reach old age at considerably different rates. For example, in a country where average life expectancy is 56 years, old age begins earlier than in a country where average life expectancy is 85 years. A person can be considered "old" when society starts treating them in a way that defines them as old.[18]

Glossary *continued*

Practical needs   Interventions aimed at addressing practical needs do not challenge existing gender norms and socially accepted roles, though they arise out of gender divisions of labour and women's subordinate position in society. They are addressed through short-term, immediate and practical assistance.

Queer   Queer is a term used by those wanting to reject specific labels of romantic orientation, sexual orientation and/or gender identity. It can also be a way of rejecting the perceived norms of the LGBT community (racism, sizeism, ableism etc).[19]

Rights-based approach   A rights-based approach is a way of working which is based on enabling people to realise their human rights to ensure their dignity and wellbeing.

Romantic orientation   A person's romantic attraction to other people, or lack thereof.

Sex   Refers to physical and biological attributes such as sex chromosomes, hormones and reproductive organs, which are used at birth to identify individuals as female or male.

Sexual orientation   A person's sexual attraction to other people, or lack thereof.[20]

Social exclusion   A complex and multi-dimensional process involving the lack or denial of resources, rights, goods and services, and the inability to participate in the normal relationships and activities, available to the majority of people in a society, whether in economic, social, cultural or political arenas. It affects both the quality of life of individuals and the equity and cohesion of society as a whole.[21]

Social pensions   Regular state-provided (tax-financed) cash transfers to older people, where eligibility is not dependent on past contributions or earnings.

Strategic needs   Interventions aimed at addressing strategic needs challenge existing gender roles and women's subordinate position in society. They are addressed through long-term responses that contribute to achieving gender equality. Strategic responses relate to gender divisions of labour, power and control, and may include such issues as legal rights, decent work, and violence, abuse and neglect.

Transgender   Having a gender identity that does not correspond with a person's sex assigned at birth. Transgender people may identify as male or female, or they may feel that neither label fits them.

Unconscious biases   Social stereotypes about certain groups of people that individuals form outside their own conscious awareness.[22]

7. WHO, 2015

8. https://www.stonewall.org.uk/help-advice/glossary-terms#s

9. https://www.coe.int/en/web/genderequality/what-is-gender-mainstreaming

10. CRPD, 2006

11. UNHCR, 2018

12–16. https://www.stonewall.org.uk/help-advice/glossary-terms#s

17. Mazurana D, Benelli P, Gupta H and Walker P, *Sex and age matter: Improving humanitarian response in emergencies,* Medford, MA, Feinstein International Center, Tufts University, 2011

18. VAWG Resource Guide (2016) Brief on Violence Against Older Women, World Bank, ICRW, GWI, IDB

19, 20. https://www.stonewall.org.uk/help-advice/glossary-terms#s

21. https://www.poverty.ac.uk/definitions-poverty/social-exclusion

22. https://diversity.ucsf.edu/resources/unconscious-bias

@HelpAge   HelpAge International