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**Organizational Gender Assessment Tool and Action Plan**

CEPF encourages grantees to have an Organizational Gender Action Plan, and to monitor its implementation on a regular basis. If your organization does not have an Organizational Gender Action Plan (OGAP), this toolkit[[1]](#footnote-2) will assist you to prepare one. Please note that you are under no obligation to use this assessment methodology, or the action plan template. It is a suggested option, and you are welcome to use it, adapt it or use something different.

Step 1. Conduct a Gender Self-Assessment for your organization, using the assessment tool, in Annex 1. This exercise should take approximately 3-4 hours. Follow these instructions:

* Assign an assessment owner to be responsible for questioning the team members on the score and encouraging the team to be honest and reflective.
* Select a team that represents your organization, ensuring diversity of age, gender, position, etc.
* Ensure the team understands that the assessment applies to the organization, not an individual’s personal experience.
* Complete the questionnaire.
	+ Rational for score: Explain the situation.
	+ Score: Score the statements in this questionnaire as follows: 1 = strongly disagree (also ‘no’), 2 = disagree, 3 = neither agree nor disagree (or unknown), 4 = agree, 5 = strongly agree (‘yes’).
	+ Actions for improvement: these will form the basis for your Organizational Gender Action Plan.

Step 2. Map your score, and review on annual basis:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Baseline | End year 1 | End year 2 | Possible total |
|  |
| Systems and policies |  |  |  | 40 |
| Planning, monitoring and evaluation |  |  |  | 40 |
| Gender capacity and expertise |  |  |  | 20 |
| TOTAL SCORE |  |  |  | 100 |

Step 3. Prepare your Organizational Action Plan using the template, in Annex 2.

* Compile all actions for improvement and scores from the questionnaire into the template.
* Make each action sustainable, by identifying an action that will change the situation in the future, rather than it being a short-term fix.
* Share the action points with your organization.
* Allocate responsibility and agree timetables for delivering the action points.

Annex 1:

## QUESTIONNAIRE

#### **1. Systems and policies**

|  |  |
| --- | --- |
|  | Score |
| **GENDER EQUALITY POLICY** |
| 1.1. The organization has a written gender equality policy and an implementation plan for the policy. |  |
| Rationale for score:Actions for improvement: |
| 1.2. All staff are aware of the gender equality policy and where they can access it. |  |
| Rationale for score:Actions for improvement: |
| 1.3. Human resources and/or senior leadership staff identify how gender‑related norms and health issues (e.g. childcare responsibilities, menstruation, pregnancy, etc.) may affect people’s capacity to work and provide support accordingly. |  |
| Rationale for score:Actions for improvement: |
| **MECHANISMS TO PROMOTE GENDER EQUALITY IN THE WORKPLACE** |
| 1.4. There is a gender balance among people in senior leadership positions. |  |
| Rationale for score:Actions for improvement: |

|  |  |
| --- | --- |
| 1.5. Staff who do the same work do receive the same money, regardless of gender. (E.g. systems to ensure equal pay, if they exist, are enforced.) |  |
| Rationale for score:Actions for improvement: |  |
| 1.6. There are formal protocols and reporting mechanisms in place that enable staff and volunteers to make complaints/appeal for redress on the basis of gender discrimination. |  |
| Rationale for score:Actions for improvement: |
| 1.7. There are guidelines and budget allocations that ensure that all new staff and volunteers receive gender equality training within one year of starting. |  |
| Rationale for score:Actions for improvement: |
| 1.8. There are guidelines and budget allocations that ensure that existing staff and volunteers receive refresher training on gender equality at least every three years. |  |
| Rationale for score:Actions for improvement: |
| **Your score** |  |
| Out of a possible | 40 |
| **2. Planning, monitoring and evaluation** |  |

|  |  |
| --- | --- |
|  | Score |
| **BUDGETING** |
| 2.1. The organization has a dedicated, core budget line for gender equality activities in every department. |  |
| Rationale for score:Actions for improvement: |
| **PLANNING** |
| 2.2. The organization’s overarching strategy or plan has a stated, stand‑alone objective to promote gender equality. |  |
| Rationale for score:Actions for improvement: |
| 2.3. Managers have the mandate to implement existing policies and strategies to promote gender equality. |  |
| Rationale for score:Actions for improvement: |
| 2.4. Young people in their diversity are involved and inform organizational planning, monitoring and evaluation of gender integration at all levels (i.e. not only youth programs, but overarching strategies and frameworks). |  |
| Rationale for score:Actions for improvement: |
| **MONITORING AND EVALUATION** |
| 2.5. All services and programs collect disaggregated data on sex, gender and age. |  |
| Rationale for score:Actions for improvement: |
| 2.6. All monitoring and evaluation frameworks include at least one qualitative indicator on gender equality. (I.e. more than counting the number of women or men to access services, it should represent overcoming gender‑related barriers.) |  |
| Rationale for score:Actions for improvement: |
| 2.7. Managers analyze sex, gender, age and disability disaggregated data at least annually. |  |
| Rationale for score:Actions for improvement: |
| 2.8. The organization assesses the extent to which organizational systems, services and programs are gender transformative every year through a thorough self‑assessment – such as this one – or an independently commissioned audit. |  |
| Rationale for score:Actions for improvement: |
| **Your score** |  |
| Out of a possible | 40 |

**3. Gender Capacity and expertise**

|  |  |
| --- | --- |
|  | Score |
| **GENDER CAPACITY** |  |
| 3.1. There is a resourced Gender (or Gender Equality) Unit in the organization that is funded by core, not project, funding. |  |
| Rationale for score:Actions for improvement: |
| 3.2. There are active gender equality champions within the organization. |  |
| Rationale for score:Actions for improvement: |
| **GENDER EXPERTISE** |  |
| 3.3. All staff have attended gender equality training in the last three years or have at least one year’s work experience specifically in gender equality (in the last three years). Examples of work experience include conducting a gender analysis, developing a gender action plan, producing training materials on gender equality, advising on gender issues, or integrating gender considerations into projects. |  |
| Rationale for score:Actions for improvement: |
| 3.4. One staff member is responsible for disseminating updates to all staff, at least once a year, about developments in the legal and policy environment in relation to gender equality, including relevant organizational policies. |  |
| Rationale for score:Actions for improvement: |
| **Your score** |  |
| Out of a possible | 20 |

Annex 2:

Organizational Gender Action Plan

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| --- | --- | --- | --- |
| **Action to be taken** | **By whom** | **Deadline** | **Means of verification** |
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Please add rows as necessary.

1. This toolkit has been adapted from *Gender Equality Toolkit for IPPF Member Associations: Gender Assessment Tool, June 2019*, prepared bythe International Planned Parenthood Federation (IPPF). [↑](#footnote-ref-2)