

Toolbox

The toolbox contains models, methods and tools that can simplify, and provide quality assurance for, your work to achieve gender equality. Here, you'll find brief accounts of how others have used conceptual models, methods and tools.



Models

A model is a deliberately simplified description of a complicated phenomenon. In scientific contexts, the term 'model' is often used synonymously with 'theory'.

- Doing gender
- Gender order
- Gender system
- Gender power order
- Intersectionality
- Performativity
- Queer and heteronormativity
- What's the problem?



Methods

Since gender mainstreaming is a strategy to make the gender-equality perspective permeate every process, the method entails a systematic, deliberate way of planning, implementing and evaluating work or an activity.

- 3R method
- 4R method
- Equilibrium cycle
- Evaluation
- Focus group
- Gender Auditing
- Gender Budgeting
- Gender coaching
- Gender Equality Outcome Evaluation
- Interviews
- JämKart
- JämKas Basic
- JämKas Plus
- Learning follow-up
- Logical Framework Approach
- Keys to gender equality
- makeEquality
- Open Space Technology
- Participant observation
- Statistical and quantitative analysis
- The Ladder
- Wage Pilot Analysis



Tools and exercises

Sometimes the choice of method obviously means that certain instruments (tools), such as specific gender statistics, must be used.

- Checklists
- Checklist for Planning and Organising Development Work (METS)
- Forum plays and forum theatre
- Gender coach
- Gender impact assessment
- Gender statistics
- Recruitment tools
- Role play
- SMART
- SWOT
- The Greenhouse
- Value exercises

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Models

A model is a deliberately simplified description of a complicated phenomenon. In scientific contexts, the term 'model' is often used synonymously with 'theory'.

The justification for a model's existence lies in its usefulness. By simplifying a complex situation or chain of events, the model permits a more planned, systematised analysis, both quantitative and qualitative. Models are often represented in the form of diagrams, graphs or charts showing interrelationships between the various parts of the model. Theoretical models thus also, to some extent, help to specify the object of investigation, and may also give an indication of the methods and tools to be used, i.e. how a process can be investigated.

At the point of intersection between these four processes, a gender order arises.

**A model is...
... a way of simplifying a complex situation or chain of events by tackling the problem through a planned, systematised analysis.**

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Doing gender

'Doing gender' is a framework that has been used mainly to study constructions of gender in organisations and activities.

Recommended reading (in Swedish)

Mellanchefen en maktpotential ('Middle Managers: A Potential for Power') by Susanne Andersson, Eva Amundsdotter and Marita Svensson (PDF)

Acker, J. et al. (1992), Kvinnors och mäns liv och arbete ('Women's and Men's Life and Work')

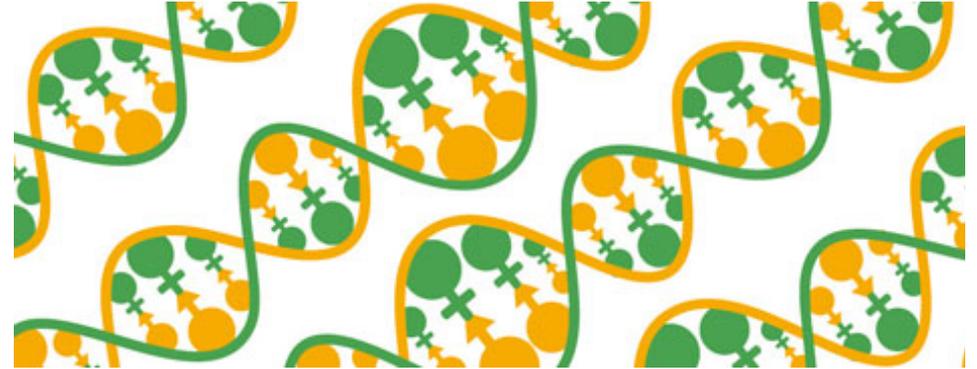
The focus is on studying how the construction of gender is interwoven with the ongoing life of the organisation.

Joan Acker has identified four processes by which gender is constructed and reproduced in organisations.

The four components make up part of the same 'reality', but they serve as different means of identifying gendered processes in ongoing events and interactions. The processes are:

- a) Structure: creation of gender segregation at every level.
- b) Symbolism: creation of symbols, images and consciousness that legitimise or contradict order.
- c) Action: interaction among individuals (recreating or departing from order).
- d) Identity and norms: individuals' notions of gender that are staged.

At the point of intersection between these four processes, a gender order arises.



Gender order

This term refers to the fact that, on a structural level in society, there is a power order in which women are subordinated to men. The term is often used as a synonym for 'gender power order', but it is also connected with other perspectives.

The use of the word 'power' in the latter term shows that this order is not a neutral one. Instead, it shows that there are built-in power relations, a hierarchy that positions the sexes. This hierarchy is based on two principles. The first is that of keeping the sexes apart: women and men are found in different arenas in society, both horizontally and vertically.

The second principle is that the man is the norm. The gender power order is therefore sustained and recreated through the male-female division. These notions are deeply rooted in society, culturally and socially. The gender patterns are created and sustained at the personal and structural level by women and men alike.

According to the theory of the gender power order as structure, it permeates every part of society — socially, politically and economically — but can be changed. It is not static and impervious to influence. Instead, it may be described as a constant process that is constructed and reconstructed all the time. It is a process that is primarily about structural differences in society, not about explaining differences between individual women and men.



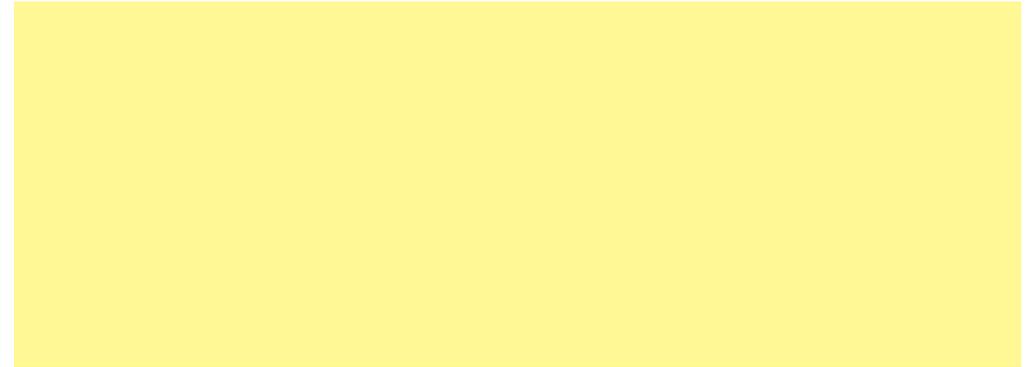
Gender system

Yvonne Hirdman's theory about the gender system is an attempt to understand and explain how gender inequality manifests itself and why it persists although measures are being taken.

The gender system is the basic precondition for other social orders, and therefore the basis for economic, social and political orders.

The system comprises two supporting logics. One is the male–female dichotomy and the other is the hierarchy according to which the man is the norm.

Through the separation imposed, the hierarchy is perpetuated and legitimised. The basic manifestations of the genders being kept apart are the division of labour between men and women and the classification of 'male' and 'female'. Children — girls and boys alike — are born into these cultural thinking patterns and shaped accordingly.



Gender power order

This term refers to the existence, at a structural level in society, of a power order whereby women are subordinated to men. It is often used synonymously with 'gender order', but it is also connected with other perspectives.

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Intersectionality

This term has been used to describe and analyse how different power orders in society cut across and interact with one another. The idea is based on the view of power as a multidimensional construct in which gender, class and ethnicity are fundamental principles.

The intersectional perspective reveals the need to start, in theory and practice, with the fact that women and men are not homogeneous categories.

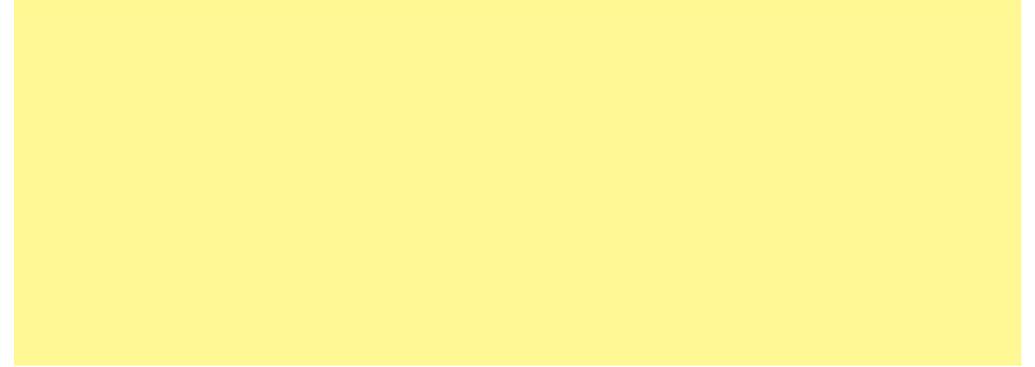
A person's life situation is created within the framework not of a single culture, gender order or class hierarchy, but of several.

Intersectionality is a tool for relating theoretically, empirically and politically to the varying experience and subordination of women. The need to understand these power relationships makes intersectionality a key theoretical tool in power analyses.

But intersectionality is also a tool that assists understanding of conditions in a society in flux. It relates to the fact that categories like gender, ethnicity, age, sexuality, class and nationality are becoming integrated with one another in a more fluid and changeable way.

The real purpose of this form of analysis is to investigate how these power axes are integrating with, and thereby reciprocally constructing and influencing, one another.

The application of an intersectional analysis does not require all power axes and bases of discrimination to be taken into account. On the other hand, it calls for a conscious choice in relation to the context of the analysis.



Performativity

Along with heteronormativity, performativity is a central concept of 'queer theory'. In its simplest form, the term 'performativity' means that sex or gender is a matter not of being but of doing. No human being automatically becomes a man or a woman. Instead, men and women are made, i.e. moulded to fit into the categories associated with sex and gender that are used by society.

When, for example, a midwife says that a newborn baby is a girl or boy, this is not only a description but a performative act. In other words, it actively affects both the parents and the child.

The pronouncement activates numerous social and psychological processes. Thereafter, the baby is incorporated in a world of notions about what is expected of a girl or boy and how people will usually respond to her or him. Accordingly, the use of language may be seen as proactive: something that creates reality.

Nevertheless, the midwife's statement is just one of a series of performative acts that makes the little person become a girl or boy. Social practices thus constantly create people's sex or gender. The same applies to sexuality, ethnicity and other social categories.

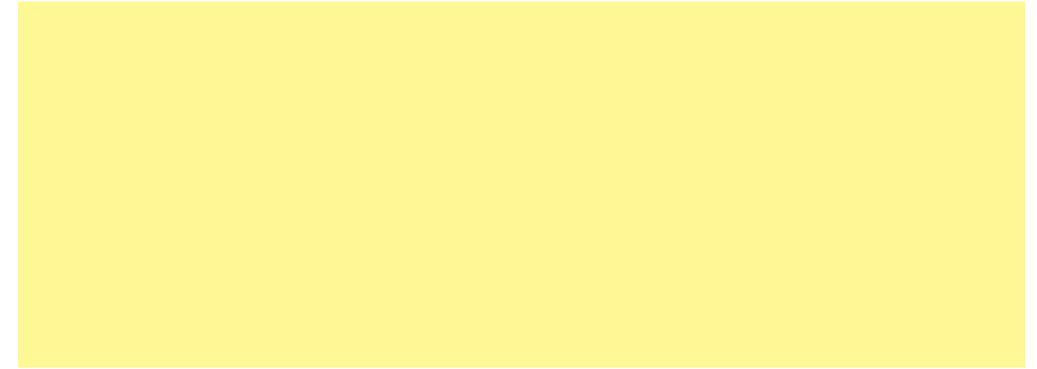
The theories surrounding performativity in connection with sex and gender in the field of gender studies were developed by Judith Butler. Her theories, in turn, are based on the linguistic philosopher J. L. Austin's thoughts about the performative nature of language and, specifically, the 'doing' of certain linguistic expressions. One well-known example is the reply 'I do' in the marriage ceremony. This is not only an answer, but also involves an action that, along with the statement by the person officiating at the ceremony, 'I now pronounce you man and wife', helps to transform a couple's status in society.



Queer and heteronormativity

The crux of 'queer theory' is questioning of norms. The nature of 'queer' is related to what we perceive as normal in our society and, accordingly, directly linked to power.

Queer theory provides tools for questioning what are seen as truths in society, such as what is natural, irrespective of whether they involve sexuality, gender or some other form of normality. The term 'queer' as such can denote many things: everything from crazy and deviant to a theory, a description of LGBT (lesbian, gay, bisexual and transgender) people and sometimes also those who generally fall outside norms. Since the term originated in the homosexual movement, most studies in queer theory focus on the breach with sexual norms, structures and identities. A division criticised in queer theory is that between sex and gender, or biology and culture. The intention of these terms is, admittedly, to pinpoint the influence of culture. But they also involve a risk of recreating the notion that there are natural, original male and female characteristics, and that these are directly associated with a particular kind of sexuality: heterosexuality. The image of a 'natural sex' cannot be seen as a neutral truth. Rather, it should be seen as a norm system or coercive prohibition. It is a set of rules that prescribe not only how to be a man or woman but also that one should be a man or woman. The categories of 'man' and 'woman' exist within a heterosexualised framework of understanding — the heterosexual matrix — in which two separate genders are presented as the only possible identities. Within this framework, the only positions on offer are those of woman and man. They are juxtaposed in both physical and behavioural terms, and the two sexes are also expected to attract and desire each other. Appearing as a woman therefore requires, first, having a body that is categorised as a female one; second, behaving (walking, standing, dressing) in a manner regarded as female; and, third, manifesting the right kind of desire, i.e. heterosexual (and the heterosexuality, in turn, must be practised in a manner defined in advance). Although sexuality is the focus there is, with an approach based on queer theory, an enhanced will to examine how norms of sexuality coincide with notions of class, ethnicity, place, disability etc. Queer theory can thus be used for thinking about normality, normalisation processes and power in general.



What's the problem?

Carol Lee Bacchi's What's the Problem? approach helps to show the premises underlying ways of tackling gender issues and solving problems.

This approach starts with the fact that no laws, political action programmes or work plans are neutral. Rather, they are created by human beings in a particular situation and a given setting.

This standpoint differs from that of many other methods of policy analysis in the sense that it focuses on what is regarded as being the problem. How is the problem represented? How does the way in which a problem is formulated also affect its solution? Bacchi's model is part of the tradition of discourse analysis, in which discourses may be understood as generally accepted and authorised ways of speaking or writing about, or understanding, something. Discourses restrict what can be said and by whom.

In this context, it means that the policy on which gender mainstreaming is based steers politics in a certain direction. Accordingly, it makes some changes in society, but not others, possible. It is therefore essential to be aware of what may be regarded as a problem, why it is a problem, how it is explained, what is thought to be its cause, what solutions are considered suitable and who is responsible for solving the problem. Finally, questioning the effects of all this is important.

Bacchi identifies three analytical categories for answering these questions. The first concerns the groups to which values and positions are attributed — people at a disadvantage or in need, for example. The second category is aimed at revealing what can be said, when and where it can be said, and by whom. The third category concerns the lived effects, i.e. the impact on people's lives.



Methods

Since gender mainstreaming is a strategy to make the gender-equality perspective permeate every process, the method entails a systematic, deliberate way of planning, implementing and evaluating work or an activity.

In gender-mainstreaming efforts that address research and development (R&D) and rest on a foundation of gender studies, 'method' means various concrete ways of working to attain established aims.

On the basis of current R&D work, most methods can be grouped into those used for educational and/or training purposes, to raise awareness and disseminate knowledge, and those that serve fact-finding and analytical purposes. These methods are commonly found in all development work.

Education, training and knowledge dissemination are fundamental methods in all development work. Knowledge development always benefits from taking place in interactive processes in which survey and analytical methods are integrated with knowledge retrieval.

Method

A method is a planned procedure for solving a problem. In academic contexts, a distinction is drawn between quantitative and qualitative methods. Methods can also be researchers' ways of arriving at conclusions, i.e. by means of analysis or synthesis.

- 3R method
- 4R method
- Equilibrium cycle
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3R method

The 3R method involves surveying and analysing an activity in terms of gender equality, on the basis of Representation, Resources and Realia.

This is a means of exploring the norms that govern work, the division of power between women and men, and the ways in which gender affects the nature and organisation of the activity.

The method was developed in the JämKom project on municipalities and gender equality, headed by Gertrud Åström under the aegis of the Swedish Association of Local Authorities in the late 1990s. It has been used mainly in various municipal activities.

The method stresses that all three Rs are required to gender-mainstream an activity. The first two are about compiling statistics, and serve as the springboard for discussion about the third and last R.

Representation, Resources and Realia

1R – Representation

What is the gender distribution at every level of the activity and decision-making process, i.e. among staff, decision-makers and users?

2R – Resources

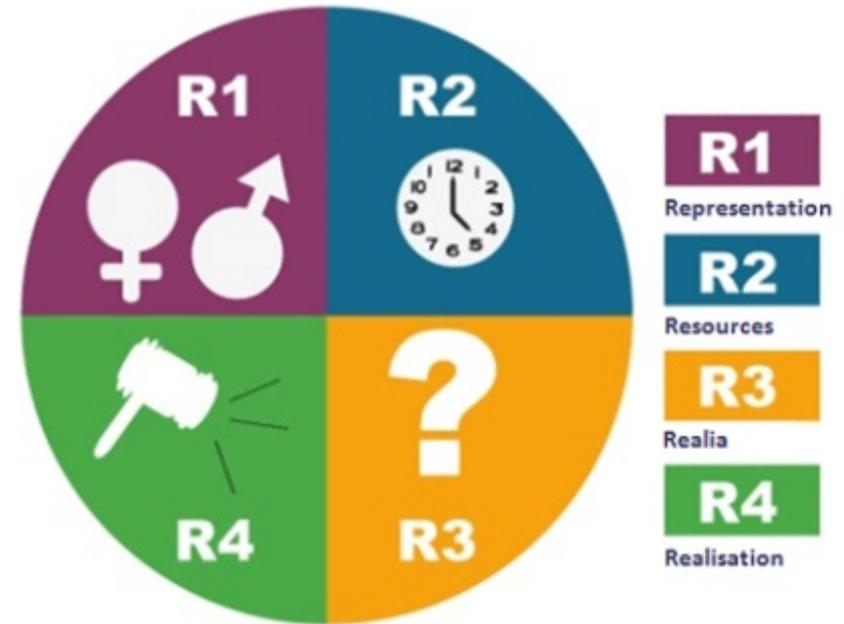
How are the resources in the activity, in the form of time, money and space, distributed between women and men?

3R – Realia

How did representation and resource distribution between the sexes come to be as they are? The purpose of the realia is to address the question of what it all really involves, and to demonstrate what may be considered self-evident in this activity: the gender-related norms and notions that shape it. Providing an answer to this question calls for knowledge of gender studies about the conditions of men's and women's lives and constructions of gender.

Carrying out analyses on the basis of gender is no easy task, since the phenomena to be analysed and problematised are usually perceived as natural and normal. To permit a reliable analysis, collecting quantitative data in steps one and two is therefore not always sufficient. Quantitative studies may therefore need to be supplemented by qualitative ones, for example in the form of interviews with decision-makers, employees or users.

Thereafter, the results from the various investigations should be compared with established objectives and decisions taken on whether the activity needs reforming and, if so, how.



4R method

This method is a further development of the 3R method, with a fourth step added: Realisation.

This method is a further development of the 3R method by the Swedish Gender Mainstreaming Support Committee (JämStöd) in conjunction with its final report on the scope for gender mainstreaming (in Swedish; SOU 2007:15 Stöd för framtiden – om förutsättningar för jämställdhetsintegrering). The 4R method may be used as a basis for analysing and surveying activities, and for providing an overview of how activities are run and financed, and how they should be changed to reduce gender inequality. The 4R method may, in brief, be described by what the four Rs stand for:

R1 is Representation: a survey of how women and men are represented in the various parts of the organisation, and on its different levels.

R2 is a matter of how Resources are distributed between the sexes.

R3 refers to Realia, i.e. why representation and resources are distributed as they are. What are norms and conditions like for men and women in the organisation?

R4 means the Realisation, through an action plan (and the action involved), of what is to be achieved by formulating new objectives and measures.

Equilibrium cycle

The procedure for this method is described in the 'Equilibrium' project, which is run by Näringslivets Ledarskapsakademi (the Business Leadership Academy), in terms similar to 'the Ladder', i.e. the eight steps of Gender Equality Outcome Evaluation. The Academy has developed a process model known as the 'equilibrium cycle' that encompasses everyone in a work organisation, irrespective of occupational role or position.

The key words, step by step from the initiation of efforts to promote and achieve gender equality, are as follows.

1. Knowledge

Everyone who is expected to take part in the reform work needs knowledge. For people to create an image of the current situation, facts about the organisation concerned are also necessary. The purpose of a fact-finding survey is to reveal any differences between women and men engaged in the activity, and to answer such questions as 'What is the sex composition at different hierarchic levels, in different occupational groups and for different decision-making processes?'

A survey of resource distribution with respect to time, money and space should also be included. Examples of relevant questions are:

'What are the forms of employment and the recruitment processes?'

'How are salaries and employment benefits distributed?'

'Who exerts power and influence over activities?'

'Which individuals use their parental leave?'

For the survey to become comprehensive, it needs to be supplemented with a customer and citizen perspective. What is the situation of those whom the activity addresses? For example, how does it reflect the needs of, response to and resource distribution among women and men?

The next step is to analyse, interpret, explain and make sense of facts that have been collected. Which gender patterns do they reveal? Why are these as they are? What repercussions do they have on activities?

2. Insight

To reach insight, time for reflection, dialogue and comparing notes is needed.

3. Planning

The purpose of this step is to plan the work. What needs to be done, how and by whom? Objectives need to be defined and priorities assigned. Objectives may be qualitative, quantitative or a combination of both.

4. Action

The objectives are broken down as concrete measures, and all those involved should be allowed to know how they are expected to contribute to target fulfilment. The management and executives must personally take part and be active in the work and evaluate the results attained.

5. Outcomes

Reforms have been implemented, activities concluded and, if all has gone according to plan, objectives achieved.

6. Evaluation

The work needs to be evaluated and experience shared. What has contributed to the outcomes that have been attained?

7. Learning

The task of promoting gender equality has no end point. It needs to go hand in hand with the ongoing work of reforming activities. For further efforts, it is important to demonstrate clearly what has worked and what has not worked.

8. Further progress

Evaluation

Evert Vedung opens his book on evaluation (in Swedish) with the words 'Unintentional effects of intentional action are fascinating.' This is why mechanisms for outcome analysis and information feedback have been created in the public sector.measures are being taken.

Since the 1960s, evaluation has therefore been launched as a mechanism of this kind in many democratic states.

According to Vedung, evaluation means a subsequent thorough survey and assessment of the implementation and results of measures in the public sector. The purpose of evaluation is to bring about self-reflection, a deeper understanding and well-founded decisions. Evaluation means monitoring, systematising and rating a planned activity and its outcome in such a way that, for example, agencies can work as responsibly, creatively and effectively as possible.

There are many models for evaluation and they are distinguishable by their specialist focus (specialist models) or how the evaluation is organised (institutional models). To name a few specialist models, there is one focusing on evaluation of target fulfilment, the system model and others for target-based and non-target-based evaluation, user-oriented evaluation and stakeholder evaluation. Some institutional models are the Swedish SOU (Swedish Government Official Reports) model and collegial assessment (including peer review).

Focus group

A focus group may be described as systematised group interview. It is a simple, fast method that can be used as a survey tool. The basis of this tool is the group members' assessment of which factors are most important on a particular issue.

he survey work is frequently combined with evaluation of how the activity is assessed on the basis of its quality factors.

The group give ratings to issues they find important. This can often create a basis for deciding on the most important matters to concentrate on.

The great advantage of the method is that it is based on dialogue and participation, and that summarising and reporting the results can be done quickly. Focus groups are commonly used to find the right questions to ask before a questionnaire is distributed or, conversely, to perform an in-depth analysis after questionnaire or other surveys have been carried out.

The method is also suitable for use in compiling documentation for programmes or plans, or as an attitude survey (opinion poll) on a particular matter.

Focus groups' composition can be adjusted according to what one wants to know more about. For example, groups may comprise women or men only, or mixed groups. The important thing is to have a clear purpose and to analyse results in the light of the group composition.

Step by step, the method is as follows:

- Invitation
- Factor selection
- Factor weighting
- Factor rating
- Result reporting
- Analysis.
- Print



Gender Auditing

Gender auditing is a method that can be used both to survey and to monitor promotion of gender equality in an activity or organisation.

The importance of gender auditing originated in a growing awareness of the bearing that the structure and culture have on the design and implementation of gender-equality projects. This makes it important to investigate not only its usefulness but also its systems and processes in the organisation after projects have been adopted and implemented.

Unlike evaluations, for which organisations often engage external evaluators, gender auditing is an internal process. It is based on the premise that working on gender-equality issues encourages organisations to review their own organisation and to reform discriminatory cultures and structures within themselves.

The idea is to investigate how far the organisation lives up to valuations and established aims. For implementation, it is important for there to be clear aims and strategies against which the issue of gender equality can be evaluated.

Gender auditing also presupposes constant, explicit support on the part of the organisation management to ensure that staff have the time and opportunity to carry out such an audit — that is, unless it forms part of the regular quality assurance carried out.



Gender Budgeting

Gender budgeting is a matter of revealing the people behind the numbers. How are public resources divided between women and men, girls and boys? How do they meet the needs of women, men, girls and boys? These are fundamental questions in gender budgeting.

This method has been used mainly to analyse, in terms of gender and gender equality, how public resources are used.

Have the Government's gender-equality aims, for example, been translated into budget decisions?

The purpose is to prevent public funds being distributed in a way that is inequitable and discriminatory and, instead, attain a fairer distribution of resources.

In particular, this is important because a budget may give the impression of being gender-neutral.

In fact, of course, budgets are not gender-neutral since they distribute resources in a manner that affects different groups of people and, by the same token, women and men, girls and boys.

Knowledge and awareness of the gender effects of the budget reveal whether resources have to be redirected to create more even and equitable distribution.

The focus is thus on resource distribution, and not on budgeted allocations having to be changed.

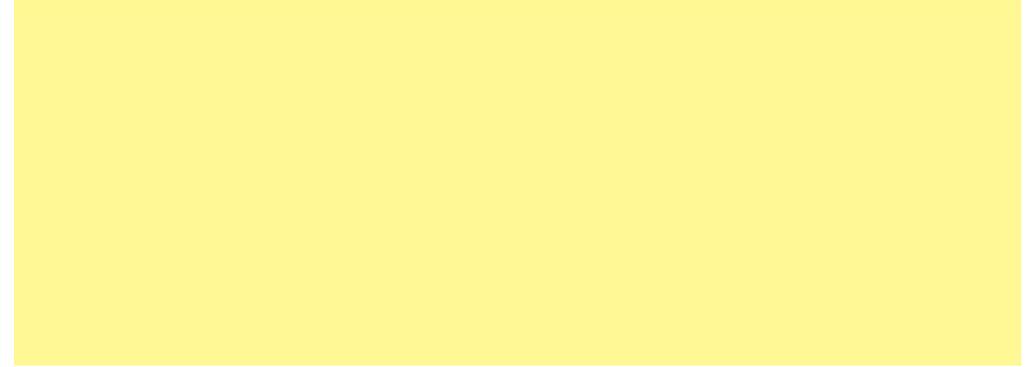


Gender coaching

In gender coaching the coach, who may be a consultant or researcher, participates in and observes an activity, such as a meeting.

Afterwards, the gender coach and the stakeholder who is to become aware of how gender is made in the situation or organisation concerned review the events, and analyse and interpret what happened and how different participants behaved. The method can be used to create an in-depth understanding of how gender is constructed in organisations.

Observation of meetings, for example, can help to generate an understanding of how power and gender can be constructed in relation to those who are included in and excluded from discussions. This method enables the person in charge of the project or reform to reflect about everyday work and then process this knowledge, jointly with the gender coach, to arrive at an interpretation in terms of gender theory. The method promotes the practitioners' learning while simultaneously contributing knowledge of gender studies.



Gender Equality Outcome Evaluation

JämUR, Gender Equality Outcome Evaluation, is an abbreviation of the Swedish words Jämställdhet Uppföljning av Resultat (literally, 'Gender Equality Follow-up of Outcomes').with 'gender order', but it is also connected with other perspectives.

The purpose of the method is to follow up outcomes of operations in terms of gender equality. It will then be possible to adopt measures capable of making activities more gender-equal. The Swedish Gender Mainstreaming Support Committee recommends using the method as a way of following up JämKAS Basic. One anticipated result of using Gender Equality Outcome Evaluation (GEOE) is that it makes measuring the impact of activities, and their costs to both women and men, feasible. Another is that it should permit proposals for improvements to make activities more gender-equal to be put forward.

GEOE step by step

Step 1 Operations

Step 2 Outcome

Step 3 Costs

Step 4 Conclusions

Step 5 Measures

Step 6 Proposed improvements

Step 7 Feedback

Step 8 External feedback



Interviews

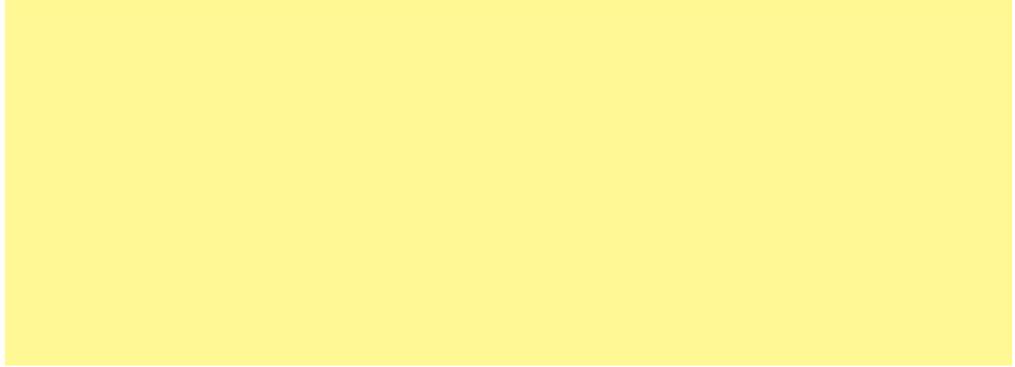
Interviewing is a method used to gain direct access to people's thoughts and opinions. The purpose of the method is to see and understand how a group of people (such as politicians, salaried employees, young people or citizens in general) think, act, reason and argue — and why.

Interviews are a method that is often aimed at revealing underlying values, and which represents an empirical approach that is unique in affording direct access to people's thoughts.

There are several types of interview and questionnaire survey.

A common watershed is that between respondent and informant surveys. The difference between these two lies in the object of study. If the interviewees' own subjective values and thoughts are the focus of interest, it is a respondent survey.

If, instead, the researcher is seeking more facts about an event it is an informant survey that is called for. Depending on the purpose and the area of application of the interview, there are a range of different issues to take into account. Examples are selection, the type of analysis, source criticism and whether the interview should take place in the form of a discussion or according to fixed questions.



JämKART

The JämKART (JämställdhetsKARTläggning, 'Gender Equality: Survey, Analysis and Conclusions') method was devised by the Swedish Gender Mainstreaming Support Committee (JämStöd). Its purpose is to provide a quick overview of the impact that an operation or activity has on gender equality, and to facilitate assessments of how far gender-equality promotion has progressed to date.

The method also affords scope to develop improvement measures that can be inserted in an activity plan, if any, for gender mainstreaming.

JämKART can, with advantage, be used to carry out overviews of activities before ways of performing in-depth gender-equality analysis are chosen and given priority.

The method is used to give an overview of which activities are important for gender equality; how activities already help to fulfil the aims of gender-equality policy; and the improvement measures that may need to be implemented to make the aims achievable.

JämKART step by step

- Step 1 Examine the impact on gender equality
- Step 2 Examine how the activity contributes to gender equality
- Step 3 Assess the current situation
- Step 4 Find advantages and obstacles
- Step 5 Assess the potential for improvement
- Step 6 Plan improvements

JämKAS Basic

JämKAS Basic is a method for systematic gender-equality analysis of an activity. JämKAS is an abbreviation of the Swedish words for ‘Gender Equality – Survey – Analysis – Conclusion’. The method is composed of several parts: inventory, prioritisation, survey, analysis, measures and monitoring.

JämKAS Basic was developed in the Swedish Government Offices. The fundamental idea is that the method should contribute an analysis of activities based on gender-equality arguments; serve as a basis for choosing the most relevant area of work; be an aid to drawing up measures; and yield indicators to measure reductions in gender inequality.

The purpose is to analyse how activities can help to achieve the aims of gender-equality policy. The analysis focuses on the parts of activities that target their customers, clients and/or users, not internal gender equality in the form of staff-policy issues.

Three-phase method

The method can be divided into three phases: making an inventory, survey and analysis, and formulating objectives. Those working in organisations governed by objectives can use, instead of activities themselves, the objectives of activities in the various phases. Objectives and indicators should be formulated as a third phase.

Making an inventory

- Step 1 What fields of activity?
- Step 2 Examine the activities
- Step 3 Choose an activity

Survey and analysis

- Step 4 Identify the target group
- Steps 5 and 6 Survey gender patterns
- Step 7 Describe impacts
- Step 8 Describe desired activity

Formulate objectives

- Step 9 List possible changes
- Step 10 Decide on measures
- Step 11 Measure results

JämKAS Plus

JämKAS Plus is a method from the Swedish Gender Mainstreaming Support Committee (JämStöd) that can help in the task of performing an impact assessment of a gender pattern.

The purpose of the method is to serve as support for clarifying the gender-equality perspective in a specialist area; showing the complexity of what causes shortcomings in gender equality; and facilitating the task of choosing measures and initiatives to combat gender inequality.

Using this method, one can investigate whether the gender pattern is a problem and whether, in such cases, it may be regarded as a gender-equality problem. The method can also be helpful if one wants to choose measures and initiatives to combat a lack of inequality.

Three-phase method

The method may be divided into three main phases: survey, analysis and conclusions.

Survey

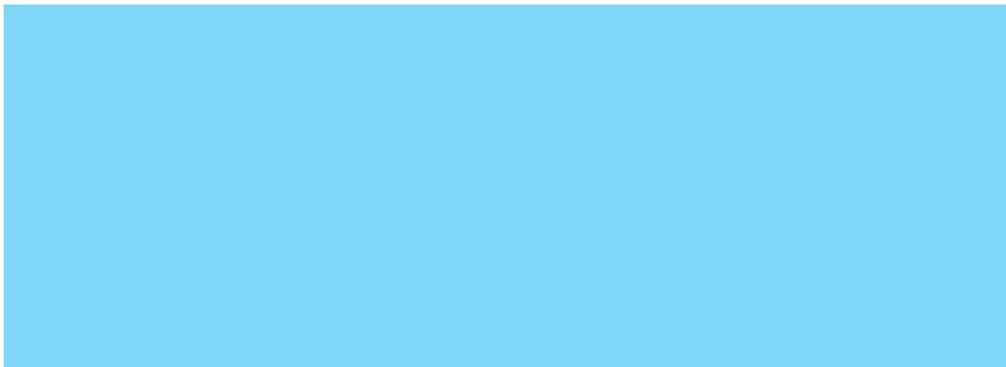
- Step 1 Identify target groups
- Step 2 Report gender patterns
- Step 3 Formulate observations
- Step 4 List causes and consequences
- Step 5 Discard and/or confirm

Analysis

- Step 6 Analyse and describe
- Step 7 Identify agents and stakeholders
- Step 8 List possible measures

Conclusions

- Step 9 Propose measure



Learning follow-up

‘Learning follow-up’ is a method of using reflection and problematisation to lay the foundations of development towards gender-equal activities. The approach is, as the term implies, a combination of learning and follow-up.

Opportunities for learning are rare in today’s world of work. Meetings of employees, the management group and departments are usually about reporting what one has done and providing information about, or discussing, what is to be done. Reflections, conclusions and lessons drawn from what has been done are unusual. Activities are most often followed up in the form of quarterly reports or other recurrent reports on what has been done, and these follow-up studies are often quantitative. But not everything is measurable in figures, and we therefore present here a model for qualitative follow-up of gender mainstreaming: ‘learning follow-up’.

The ‘Guide to Learning Follow-up for Gender-Equal Activities’ (Lärande uppföljning för jämställda verksamheter –Handledning och frågeguide) addresses, in particular, activities that already have gender-equality objectives and have worked in practical ways to achieve them. It may also be seen as complementing the makeEQuality tool, which is used for reporting on, monitoring and improving promotion of gender equality. Learning follow-up affords extra scope for evaluating gender-equality promotion, but it also calls for somewhat more knowledge from its users. It is a qualitative method for people who have already made some progress in their gender-mainstreaming efforts.

Logical Framework Approach

The Logical Framework Approach (LFA) is a target-driven method of project planning that can be used in work on activities that are not project-oriented. The method has long been used by the Swedish International Development Cooperation Agency (Sida), and is also used in the projects funded in the European Social Fund.

This method comprises various stages and can, independently from the content of the work, focus on various aims and meeting various purposes. It can be an instrument for target-driven planning, analysis, assessment, follow-up and evaluation of projects.

But it can also serve as support for logical analysis and structured thinking, both in the planning and in the implementation of work. Being a framework, it affords structure and serves as support for projects in which dialogue is important for attaining objectives. This defines and reveals various elements in a process of change (problems, aims, stakeholders, implementation plan etc.), and becomes an instrument for generating participation, responsibility and ownership — all factors that are crucial for success. Last but not least, it is also a way of describing and summarising projects and activities.

Nine steps of an LFA analysis

- 1) Analysis of the context and scope of a project
- 2) Stakeholder analysis
- 3) Problem and situation analysis
- 4) Definition of objectives
- 5) Activity plan
- 6) Resource planning
- 7) Indicators, measurements of target fulfilment
- 8) Risk analysis
- 9) Analysis of requirements for target fulfilment.

LFA method on three objective levels

- 1) The overall or development objective, i.e. the long-term change that the project seeks to promote but which may not be attained until several years after project implementation
- 2) The project objective, which describes the actual purpose of the project and the nature of the outcome when the project is completed, provided that it succeeds
- 3) Interim objectives or outputs that describe what the project directly delivers as a result of the activities implemented.



Keys to gender equality

'Keys to gender equality' is an approach often used by the Swedish Association of Local Authorities and Regions (SALAR) for its reform work. It uses models involving training of varying duration, such as 3R training, 3xAPT, SALAR's internal gender-equality training for employees and 'National Education for Strategic Gender Equality Work' (Nationell Utbildning för Strategiskt Jämställdhetsarbete, NUSJ).

Theoretically and practically, this approach is based on the 3R method and the Swedish Association of Local Authorities' further development of the method.

The three parts are understanding of the problem (gender inequality), understanding of the objective (gender equality) and knowledge of how to achieve reform that is sustainable in the long term. The 'Keys to gender equality' method emphasises that all three components are central to change, and that knowledge and understanding of problems and objectives affect which reforms are undertaken and methods applied.

'Keys to gender equality' also points out that knowledge and reflection are required, both generally and specifically for one's own area of activity and one's own work. It also emphasises that responsibility for change is borne by the organisation, unit or agent who is normally responsible for the activities concerned.

The method in practice

Knowledge of gender inequality. What does the research say, and what is the situation at the participants' workplaces? The method involves obtaining knowledge from quantitative and qualitative studies; analysing and reflecting on the following aspects; and defining gender-equality targets in both quantitative and qualitative terms for these aspects:

the general situation in society

in their own area of responsibility and work, what they do daily in their professional capacity. They should realise their own potential, take steps to implement changes in their own areas of responsibility, draw up plans and carry out active reform measures. Finally, they should follow up and evaluate their work, develop it further and engage in long-term thinking about sustainable gender equality.



makeEquality

makeEquality is the tool for people wishing to report on, monitor and improve promotion of gender equality in their work. It can also be used to compare efforts to achieve gender equality in different activities.

makeEquality also makes it easier for citizens to find out how their municipality or county council is working on gender-equality issues, and to make active choices among schools or healthcare providers.

makeEquality has been developed by the Swedish Association of Local Authorities and Regions as a means of quality assurance for municipalities', county councils' and companies' gender mainstreaming of activities.



Open Space Technology

Open Space Technology is a good form of meeting for achieving reform and development, but also for experience-sharing and learning.

Effectively, it puts participants' commitment and knowledge to use. The form is conducive to participation and diversity.

The agenda is based on participants' interest and commitment, leading to self-organisation in interaction with the given structure.

Open Space can, for example, be used when the aim is to make strategic plans for sustainable gender equality, develop gender-equal methods for various activities, build networks and share experience among staff in gender equality and decision-makers.

Four principles and a law

This form of meeting is based on four principles and one law. The four principles are:

Whoever comes, they are the right people.

Whatever happens, it is the only thing that could have happened.

Whenever it starts, it is at the right time.

When it is over, it is over.

The only law is the law of two feet. If you do not teach or contribute to the group or at the location in which you find yourself, you are personally responsible for moving to a situation in which you do learn and contribute.

Harrison Owen is the founder of this method.



Participant observation

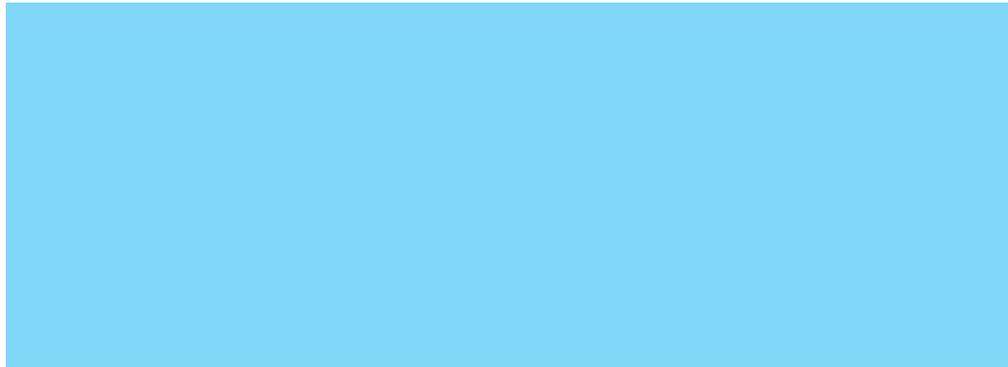
What distinguishes observations of various kinds is that their focus lies on observing what people do, not what they say. The method of participant observation is particularly suitable when the purpose is to study structures and processes that may be difficult to express in words. An example is when the aim is to study social interaction — something that is often difficult for the parties involved to describe.

Participant observation is used mainly in the social sciences. It means that the researcher is inside the cultural and social context that is being studied. The researcher follows and takes part in the everyday life of the people studied.

The degree of participation may, however, vary from full participation to pure observation. Which of the roles the researcher adopts depends on the intended object of study, but also on the researcher's theoretical premises.

The method may be ethically difficult to manage, since no one involved is allowed to come to any harm and it must be possible to protect the identity of those who are studied.

The phrase 'participant observation' often serves as an umbrella term for investigations based on both observation and interview studies.



Statistical and quantitative analysis

The purpose of statistical analysis is to yield analyses based on empirical, quantifiable data summarised in statistical form. Surveys may range from descriptive to explanatory or prospective.

The starting point of the survey is a large-scale factual problem that may relate to social, political and economic issues. A statistical problem is then defined.

The general issue must then be broken down into concrete questions that can be answered by means of a questionnaire survey or statistical experiment. The purpose of the issue basically determines which method should be used. Collected data are then processed to allow summaries in tables and diagrams in the analysis.

Many errors can arise in statistical surveys. These may lead to something unintended being measured. It is therefore important, right from the planning stage, to take possible measuring errors into account and attempt to reduce the risks. The statistical methods used in the survey must therefore be so clear that an independent person can redo the survey and obtain the same results.

In both research and practical work to promote gender equality, statistical and quantitative analysis have performed and continue to perform an important function by delivering facts.



The Ladder

The Gender Mainstreaming Manual (from the Swedish Gender Mainstreaming Support Committee, JämStöd) describes a methodical approach to work using a working model called Procedure for Sustainable Gender Mainstreaming or ‘the Ladder’.

The Ladder provides an all-round picture of all the steps that, according to the Committee, should be included in systematic, continuous work for gender mainstreaming.

- Step 1: Fundamental understanding of gender and problems of gender equality
- Step 2: Examination of the conditions for change
- Step 3: Planning and organisation
- Step 4: Examination of activities
- Step 5: Survey and analysis (here, methods like 4R, JämKAS BASIC and JämKAS PLUS are useful)
- Step 6: Formulating objectives and measures
- Step 7: Implementing the measures
- Step 8: Evaluating the outcome



Wage Pilot Analysis

‘Wage Pilot Analysis’ (Analys lönelots) is, according to the Swedish Equality Ombudsman, a ‘simple method of assessing job requirements in work evaluation for a pay survey’.

The model, created by the Swedish government agency then known as the Ombudsman against Ethnic Discrimination (DO; now the Equality Ombudsman), was completed in 2000. Since then, it has been used in both the private and the public sector in Sweden.

In a pay survey, it is important to be able to assess jobs as being equivalent. For this to be achieved, the work must be carried out in a systematic, gender-neutral way. ‘Wage Pilot Analysis’ is a method aimed at making this possible.

Wage Pilot Analysis is based on the main areas of knowledge, skills, responsibilities, effort and working conditions. All these are crucial aspects of assessing which jobs are equivalent. Through Wage Pilot Analysis, the Equality Ombudsman has constructed a basic model intended for adaptation to individual activities.

The method can also be used as a basis for setting individual pay rates. Pay agreements state that employees’ pay is determined on the basis of job requirements and also individuals’ achievements and results. Through an analysis of job requirements, the content of the work is described and a relevant basis for assessing individual performance is thereby created. The Equality Ombudsman offers computer support for Wage Pilot Analysis to facilitate adaptations, the actual task of valuation, analyses and quality checks. The system has been revised several times and is continuously updated.



Tools and exercises

Sometimes the choice of method obviously means that certain instruments (tools), such as specific gender statistics, must be used.

In R&D for gender equality based on gender studies, gender statistics (sometimes also known as ‘gender-disaggregated statistics’) are among the most useful and important tools.

Other aids that may be described as tools are checklists of various kinds. Checklists ensure that certain procedures are performed. These commonly involve retrieval of factual material for surveying various factors.

Sometimes a method chosen obviously involves dictates the use of certain tools, such as specific gender statistics. However, these tools are not necessarily or self-evidently associated with particular models for understanding reality.

Tools...

... may be defined as implements used to carry out processing of materials.

- Checklists
- Checklist for Planning and Organising Development Work (METS)
- Forum plays and forum theatre
- Gender coach
- Gender impact assessment
- Gender statistics
- Recruitment tools
- Role play
- SMART
- SWOT
- The Greenhouse
- Value exercises



Checklists

Checklists are a common way of systematically incorporating a gender-equality perspective into activities. This page gives a range of examples, including the checklists provided by the Swedish Association of Local Authorities and Regions and used by elected representatives and administrators.

Working with checklists results in consistency of work procedure. This ensures compliance with the law and is a guarantee that women and men, girls and boys will receive equivalent services and equitably distributed resources. It is also a way of enhancing quality in publicly financed activities so that they become more efficient, effective and reliable.

Gender equality entails justice, democracy and participation — the notion that men and women should have the same potential for shaping society and their own lives. Achieving this calls for equal rights, obligations and opportunities in every sphere of life. A checklist is a way of transforming these ideas and objectives into practical policy.

One risk of using checklists is that the items will be crossed off and the work then perceived as complete. But it is important to remember that it is, after all, after the crossing-off that the real work of gender equality starts. This involves a discussion based on analysis of how the work of the committee or board, municipality, region or county council can best contribute to gender equality.



Checklist for Planning and Organising Development Work (METS)

METS, the Checklist for Planning and Organising Development Work, was developed by the Swedish Gender Mainstreaming Support Committee (JämStöd), a central government body.

The point of departure is that the first step in the work of gender mainstreaming is to create an action plan. In this plan, development work is clearly demarcated in terms of responsibilities, remits and role allocation. The purpose of METS is to pave the way for an action plan of this kind.

METS stands for...

Monitoring and objectives

Education and training (in methods and theories, for example)

Task-appropriate methods and procedures (such as gender statistics, mapping, gender-equality analysis, gender impact analyses of activities, decision-making data and proposals)

Support and coordination.

These components pave the way for an overview of what the activity requires in terms of organising the work of gender mainstreaming. This is derived from a conception of the current situation, an idea about further work and a basis for planning the management and organisation of gender-mainstreaming efforts.

Forum plays and forum theatre

The forum play is a teaching method for achieving liberation and change. It is a kind of roleplay that, in brief, involves the participants acting out brief, important situations or current problems and that ends in the middle of a conflict, blockage or difficulty.

Forum plays are performed for participants, and the spectators are invited to enter the play and try out various solutions. The forum play is a playful and serious method to get inspired by. It is one way of detecting and sharing various ideas, creating new opportunities for actions and stopping oppression and injustice. It is about venturing to try changing unsatisfactory conditions, raising awareness and freeing personal resources.

Forum-play procedure

The participants are divided into small work groups through voluntary choices. Time is set aside for performing a small roleplay (four or five minutes). The action should be realistic and show an example of injustice, a dilemma or oppression.

The play is acted to the rest of the group, who are the spectators. On the second occasion, the play is interrupted when the oppression is at its worst and the spectators are given the chance to help the character who is in a dilemma. Someone takes the victim's role and shows how (s)he can affect the situation by behaving differently.

When the group feel that they have finished, they switch to in-depth reflection. In work to reveal gender inequality and bring about gender-aware workplaces, the forum play is a popular method. Revealing how gender is constructed in work groups, and what opportunities exist for breaking patterns, gives the participants inspiration and empowers them to behave differently.

Forum theatre is like the forum play, with the difference that the scenes are performed by forum actors who have prepared a number of scenes. Forum theatre can be produced for a large work group. The forum play, on the other hand, is most suitable for a small work group.

In both, the person who has a dilemma or is disadvantaged is always replaced. This is to enable the participants to try ways of combating injustices. The idea is that the scope for change exists in every individual.

Boal (1977) is of the opinion that liberating acts can be carried out in the forum play, so that the same liberating acts can be carried out in reality as well. The forum play activates people at individual level. In contexts of gender equality, the forum play should therefore be associated with knowledge of the power structures of society.

Gender coach

The Gender Coach Programme gave top managers in the Swedish Armed Forces, the Swedish Police and Association of Military Officers in Sweden a personal trainer in gender-equality issues.

The Gender Coach concept was developed within the framework of the Genderforce Development Partnership, part of the EQUAL Community Initiative. The aim was to reach the top managers in organisations like the Swedish Armed Forces and the Swedish Police, and induce them to think in gender-aware ways when they take decisions.

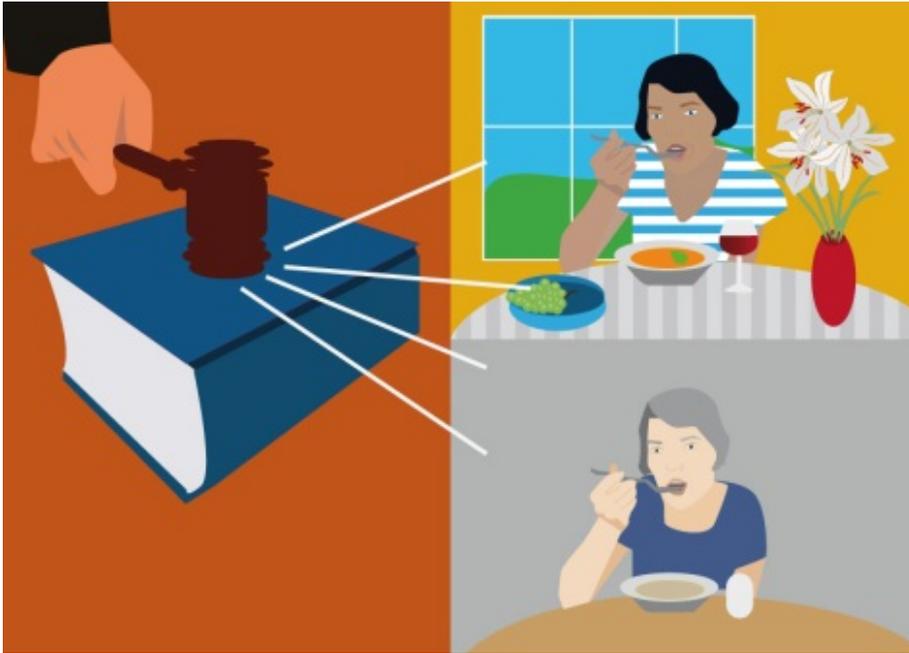
Genderforce served to improve Swedish international initiatives.

The Gender Coach Programme may be described as an exclusive mentor programme. Twelve top managers — 11 men and a woman — in the Police, Armed Forces and Association of Military Officers in Sweden were offered a personal mentor or coach each for a year. This person was to serve as a sounding-board, trainer and reference on gender-equality issues.

The coaches, who were recruited from such sources as the Swedish Ombudsman for Equal Opportunities (JämO), the business sector, universities and the partnership's own organisations, were highly knowledgeable in the area of gender equality. These coaches were matched with the managers.

The coaches met their clients roughly once a month. Together, each coach-client pair decided which issues to raise. Matters discussed included everything from gender equality in private life to work-related issues.

The continuity of the concept is important. The managers were able to meet the same individual coaches, use them as a sounding-board and support in gender-equality issues, for a long time.



Gender impact assessment

Political decisions may appear to be gender-neutral but affect women and men differently. To avoid this happening inadvertently, gender impact assessment is used.

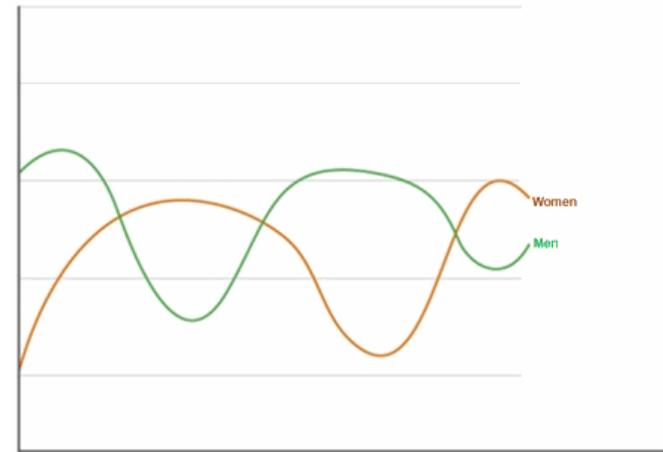
A gender impact analysis should be carried out as early as possible in the decision-making process to attain optimal results. The first stage of the analysis is to establish whether gender is relevant to the policy area in question.

To evaluate whether the issue has gender relevance, one should have access to and investigate statistical data and also answer the following questions:

Does the proposal affect one or more target groups? Will it affect daily life for one or more groups in the population?

Are there differences between women and men in this policy area in terms of rights, resources, participation, gender-related values and norms?

If the answer to any of these questions is 'yes', a gender impact assessment should be carried out.



Gender statistics

One precondition for being able to implement gender mainstreaming, set targets and carry out changes is a supply of basic facts about women's and men's situation in current activities.

The purpose of gender statistics (also sometimes known as 'gender-disaggregated statistics') is to elucidate the circumstances, life situation and needs of men and women.

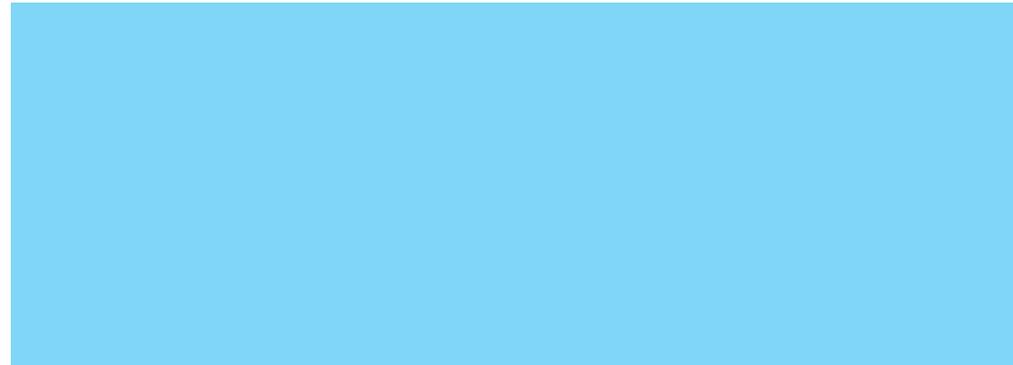
All statistics relating to individuals must be collected, analysed and presented separately by gender and constitute an overall statistical classification basis. All results, text, tables and diagrams must be consistently presented by gender.

Compiling and dividing the statistics by gender is not enough. To be meaningful, it must also proceed to analyses, objectives and measures.

By law, official statistics must be broken down by gender. Section 14 of the Official Statistics Ordinance (2001:100) states that individual-based official statistics must be divided by gender unless there are particular reasons for not doing so.

In organisations' internal surveys carried out for the purpose of statistical documentation, in which users themselves reply to questions, certain aspects can be borne in mind. One can avoid producing documents based on the assumption that all respondents will identify themselves as being of one sex or the other or in a couple or heterosexual relationship.

This may be done by, for example, offering a third option — 'other/none' — in addition to 'male' and 'female' or avoid assuming that there are two people, or one of each sex, who have custody of a child.



Recruitment tools

Most employers seek to recruit without missing the best-qualified applicants, and do not wish to discriminate. But in our encounters with others we are all influenced by unconscious structures and prejudices.

For this reason, everyone engaged in recruitment needs support to develop a more structured and professional way of working.

Using a recruitment tool rule out discrimination. It can also ensure that the right skills in terms of future needs are required and that as broad a selection of applicants as possible is obtained.

In this kind of process, job applicants feel that they are fairly treated even if the outcome is rejection.

A recruitment tool may be web-based or presented in a manual. There are several stages in the recruitment process at which the tool provides support: for example, in the wording of job advertisements, in the selection of applications and in face-to-face meetings.

Prints should therefore be associated with knowledge of the power structures of society.



Roleplay

Roleplay can be used to clarify values and perceptions or to create discussion. The work can address groups or individuals, or focus on a particular theme.

A roleplay commonly includes some kind of problem formulation that the participants must discuss and take decisions on.

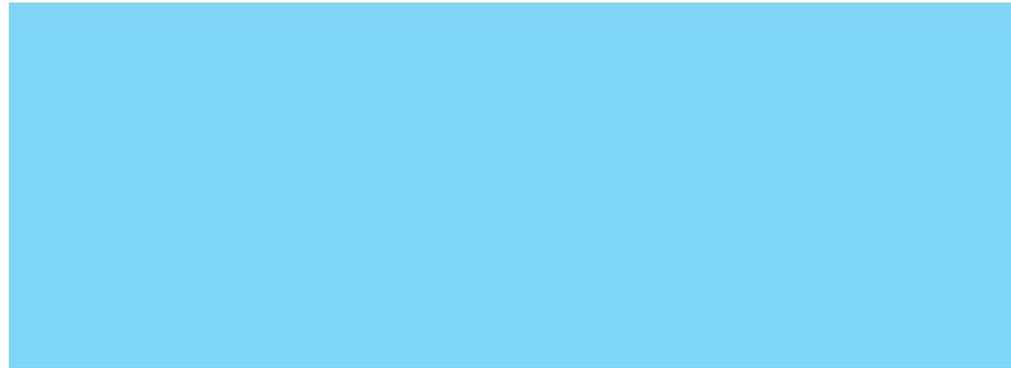
One fundamental requirement of roleplay work is that it should be led by a skilled supervisor or instructor.

Planning of time before, after and during the roleplay is important to generate an educational situation.

Planning a session for subsequent discussion as well ensures that participants can work through and reflect on the roleplay.

Since roleplays are based on genuine feelings, it is important for the participants to get a chance to work out what has happened.

When the participants have had time for reflection, they can interpret contexts and structures in the roleplay and also make generalisations and put it in a broader context.



SMART

SMART is a tool used to identify, and as a reminder to set, targets.

The acronym SMART represents goals that are Specific (clearly demarcated and identified), Measurable (and monitorable), Accepted (by all parties, or attainable), Realistic (and relevant) and Time-limited (subject to a deadline, or timely).

The idea is that the clearer the objectives of a project are, the easier it is to determine whether they have actually been fulfilled and expectations met.



SWOT

SWOT is a tool used to identify the risks involved in work or a project by pinpointing its Strengths, Weaknesses, Opportunities and Threats.

Basically, a SWOT analysis is a planning tool used in business administration and economics, but it can also be used in other activities.

The analysis relates to factors that can be influenced in an organisation's own activities, but also to factors of external origin that cannot be influenced. To facilitate the SWOT analysis, several analytical templates are available. These are then adapted to in-house activities.

Based on the analysis, one can obtain an understanding of how the organisation can act and prioritise in order to develop, and what the organisation needs to do in the long term. Finally, SWOT allows time schedules to be attached to high-priority activities.



The Greenhouse

‘The Greenhouse’ is a simple method of measuring the incidence of discrimination.

The Greenhouse is, according to the Swedish Equality Ombudsman (Diskrimineringsombudsmannen, DO), ‘a simple method of measuring the incidence of discrimination and harassment, or risk of discrimination, at workplaces.

‘The method is group-based and can work as an eye-opener or initial stage in a programme of reform.’

Value exercises

Value exercises are used to clarify and create discussion about issues in which the boundaries between knowledge and values tend to be blurred.

Value exercises may be a good way of starting a lecture, both as an icebreaker and as an ‘energiser’ — a way of stimulating ideas.

They are a tool used for the purpose of holding a dialogue about, reflecting on and discussing values — especially personal ones, but also those of one’s sphere of work, organisation and community.

Values or norms are revealed and scope for greater awareness, development and change is created for the group and the individual.

Value exercises: form and content

‘Form’ refers to the actual structure of the exercise: the ‘recipe’. The form may be direct and simple, such as the ‘hot chair’, ‘value barometer’ or ‘four corners’ exercise.

Value exercises may also be more complex in form. Examples are roleplay, forum theatre and discussions in small groups (‘idea hunters’ etc.). The content is determined by the subject to be problematised, the questions posed and assertions made, the knowledge available in the room and the manner in which dialogue during the exercise and discussion after it are conducted.

Examples of value exercises

At jamstalltdskola.se (pdf), the following are described in Swedish: the ‘hot chair’ (heta stolen), ‘hot line’ (heta linjen), ‘four corners’ (fyra horn) and ‘unfinished sentences’ (oavslutade meningar).

The Swedish Youth Federation for Lesbian, Gay, Bisexual and Transgender (LGBT) Rights and the Living History Forum have jointly produced a set of material on methods, entitled BRYT, ‘BREAK’, (pdf) in English. This contains several value exercises on norms in general and the heteronorm in particular.

‘Four corners’ is an exercise in which participants must take a stand on four statements that are placed in different corners of the room. The group leader initially poses a question or makes an assertion. The participants then express their attitude by going to one of the four corners. The participants then have to present the reasons why they chose as they did. Finally, they have a chance to move to another corner, i.e. to change their opinion.