SOLIDARITY CENTER

GENDER PROGRAMMING MANUAL

The Gender Programming Manual was developed by Lisa McGowan, Senior Program Officer at the Solidarity Center, and Pamela Sparr, an independent consultant and gender expert. Special thanks to the Solidarity Center staff in Washington and in the field who provided valuable insights and feedback on this manual.

The American Center for International Labor Solidarity (Solidarity Center) is a non-profit organization established to provide assistance to workers who are struggling to build democratic and independent trade unions around the world. It was created in 1997 through the consolidation of four regional AFL-CIO institutes. Working with unions, non-governmental organizations, and other community partners, the Solidarity Center supports programs and projects to advance worker rights and promote broad-based, sustainable economic development around the world.

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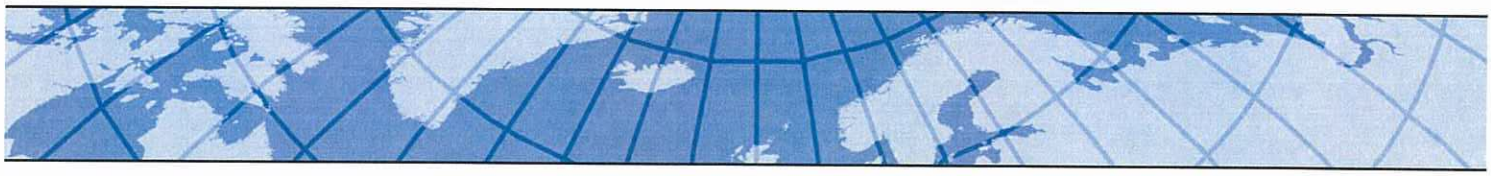
PREFACE



Since the launching of the Solidarity Center (SC) in 1997, there has been an institutional commitment to both increasing the number of women participants in our programs and to strengthening the role of women in the labor movement. Leadership training for women, establishing quotas for women's participation in workshops, targeting educational opportunities to women workers, and providing support to women's departments in our partner unions were among the programmatic strategies undertaken. It became clear early on, however, that these important initiatives alone could not change the well-entrenched dynamics of gender discrimination that impede the realization of worker rights. In 1999 and 2000, the SC undertook a gender assessment of its programs to make recommendations for more effectively promoting gender equality in our work. Four teams of two SC staff traveled cross-regionally and, following a common format, protocol, and series of questions, looked at select programs through a "gender lens."

We found that the common trade union notion that improving conditions for all workers will improve conditions for women overlooks the ways in which gender discrimination depresses wages and working conditions for all workers. We also found that: consistent support from the SC had the effect of promoting trade union partner commitments to gender equity; the gender focus of programs was strongest where trade unions perceived women workers as key to their survival; and, critical to gender-inclusive program design and implementation is the assurance that both men and women have proportional and appropriate access to project benefits.

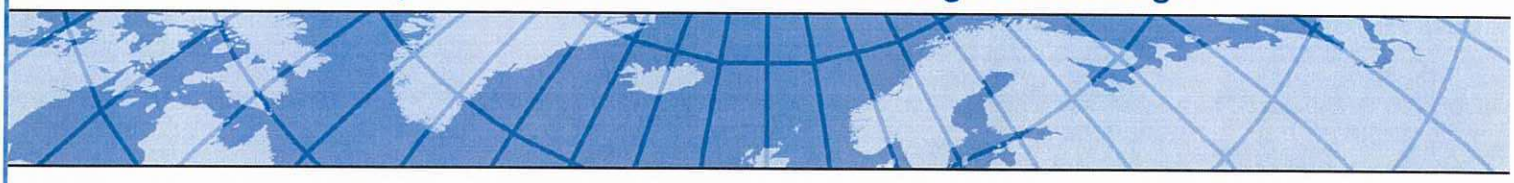
It was clear from the assessment that long-term institutional approaches that build gender awareness into all aspects of the SC programs were needed to help correct the effects of entrenched gender discrimination. The SC adopted a gender policy that makes gender equality – by which we mean, in part, the equal enjoyment by women and men of opportunities, resources, rights, and responsibilities - central to our mission. In addition, the SC instituted a program of training for staff to increase gender awareness and enhance gender-programming skills. The SC also developed resource materials for staff and trade union partners to use to promote gender equality in their work.

This manual is part of that work. It contains tools to help staff systematically broaden the sources and types of information they gather, apply a gender analysis to their work, design programs that advance gender equality in a wide-range of contexts, and develop indicators to help track progress. Many of these tools also can be used or adapted to address measures of racial, ethnic, religious, or class equality, thus situating our gender work within the larger context of overall social and economic justice.

To advance gender equality, we need to engage as individuals and as an institution in a dynamic and long-term process of social change. The development of this manual as a guide for SC programming is one of many practical steps to bring us closer to our goal of gender equality and the achievement of full worker rights.

INTRODUCTION

Why Focus on Gender Programming?



A union was struggling to deal with privatization. The leaders were working to keep the members unified and knowledgeable about their rights as they entered into negotiations with the management of companies being privatized in their sector. Management was offering an early retirement (ER) package as a way to downsize the labor force. Many of the women members, struggling with the multiple demands of home and work, leapt at the chance to take early retirement as a means to make their lives easier. The male union leaders, unaware of the needs and perspectives of the union's women members, hadn't counted on this mass exodus. This lack of awareness weakened the union's bargaining position, preventing it from improving both the ER package and working conditions for those members who wanted to stay. Members were left angry and demoralized.

THE BENEFITS OF GENDER PROGRAMMING

The above example is just one of many that emerged during the regional gender programming workshops held with Solidarity Center (SC) field staff between 2002 and 2003. It illustrates how inattention to gender dynamics can be costly. Projects may fail or be less effective if they ignore whole groups of people who could be crucial allies. There can be unfortunate unintended consequences.

Conversely, paying attention to gender can pay off even in unexpected ways.

- In one country, staff noticed that women tend to share information where men tend to hoard it. When the SC arranged computer training, women were the focus because they would be better communicators and sharers, and therefore more effective in strengthening the union's technical capacity.
- In another example, while discussing the importance of building strong relationships with union leaders, SC staff realized that the tried-and-true method of socializing over drinks after hours not only excluded most women, but also many Muslim trade unionists. This created an unintentional bias in the informal networks of support, guidance and collaboration that Field Representatives (FRs) routinely develop, and constrained their role as "bridge-builder" among different groups.

SEX: Sex refers to the biological identity of males and females, as manifest primarily by our physical characteristics.

GENDER: Gender refers to our social and psychological identity as males and females – what it means to be masculine or feminine in the society in which we live. Gender is not fixed – it is a social construct, often shaped by other identities such as our class, ethnicity, age and religion, and it can and does change over time and across cultures.

- Staff working in countries devastated by ethnic violence, conflict and economic collapse realized that doing something out of the ordinary for "traditional" union programs - such as providing a safe space for men to talk about what it means to be men in a shattered world where so many were unemployed – might be an effective way to help rebuild unions and address men's particular experience with dislocation.

As these examples illustrate, paying attention to gender differences in our programs strengthens our work and the outcomes for our partners.

GENDER PROGRAMMING: Gender programming is a means for operationalizing a commitment to gender equality by developing and implementing specific objectives, measures and activities that promote gender equality.

GENDER EQUALITY: A Necessary Condition for Achieving Full Worker Rights

Gender programming is a way to increase the reach, effectiveness and efficiency of our work. But more profoundly, it is a means of operationalizing our understanding as a worker rights organization that without gender equality, neither worker rights nor broader social and economic justice can be achieved. This is evident in the discrimination and labor market segregation that has left women with lower wages and worse working conditions than men, weak or non-existent legal protections and few, if any, unions to represent them. Indeed, companies and governments often use cheap and flexible female labor as a "comparative advantage" as exemplified by the vast proportion of women among workers in Export Processing Zones (EPZs). The status of women workers sets the "floor" or the bottom in both national and global labor standards. Simply put, if discrimination against women continues, wages and working conditions for all workers will not significantly improve.

The status of women workers sets the "floor" or the bottom in both national and global labor standards. Simply put, if discrimination against women continues, wages and working conditions for all workers will not significantly improve.

GENDER EQUALITY: Gender equality is our goal. Gender equality requires equal enjoyment by women and men of all the opportunities, resources, rights, rewards, goods and services that a society values. Gender equality also means equal responsibility in terms of workloads and energy expended in caring for families and communities. In the world of paid work, gender equality means, among other things, that men and women have equal opportunities for training, hiring and advancement, as well as equal pay for equal work. Gender equality does not mean that men and women become the same, or that they are treated the same. Nor is there a single model of gender equality for all societies and cultures. Rather, gender equality means that: women's and men's opportunities and life chances are equal; the differences which do exist in their talents, skills, interests and ideas will be equally valued; and, they have equal opportunities to make choices about what gender equality means and work in partnership to achieve it in their particular society.

Pervasive gender (and worker) discrimination in social, economic and political systems worldwide requires focused and explicit action at all levels – within the Solidarity Center, with our partners, with employers, and with governments – to end discrimination and achieve the human and worker rights elaborated in U.N. and ILO covenants. To do this, the power of both women and men must be brought into the struggle for worker rights.

People often think gender programming is just a fancy word for developing programs for a female audience or to address women's "traditional issues". This is not the case. Gender programming is about systematically addressing the oppression and discrimination felt by and targeted at females, based on their sex. Males can also face discrimination, limited options or stereotyping based on their sex. Gender programming works to promote the full humanity – and rights – of both women and men, while not losing sight of the fact that the system of sexist oppression works against females. It is based on the premise that women and men may have different needs and interests, and that for any type of program to be fully effective, the needs and interests of both must be considered.

Gender programming works to promote the full humanity – and rights – of both women and men, while not losing sight of the fact that the system of sexist oppression works against females.

HOW TO USE THIS MANUAL

This resource is designed to be user-friendly. It reflects the insights and experiences of staff in the field and at headquarters gathered during a series of gender programming workshops held over two years. Each step of the gender programming process is described in Part 1, with practical, real-life advice and specific content provided in Part 2.

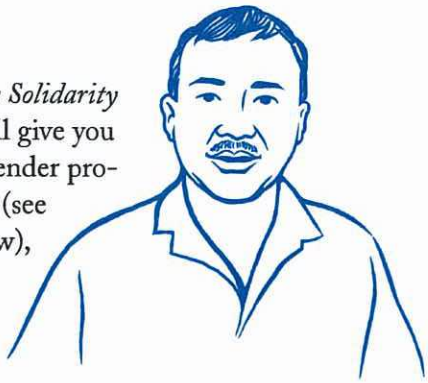
It includes:

TOOLS to guide you through the process of gender programming;

TIP SHEETS designed to give you practical advice and understanding about a specific problem or issue;

BOXES for definitions and examples; and

CHARTS with illustrative examples of how to integrate gender into programs and priorities.



If you are *new to the Solidarity Center*, the manual will give you history and context, gender programming vocabulary (see list of definitions below), and tools and techniques important for all Solidarity Center program staff. If you are *starting a new program*, the manual will make you think more systematically and comprehensively about project and program planning from the initial concept to tracking progress. Are you *revising a project*? The relevant tools and tip sheets that can be applied given where you are in the project cycle. For those staff *already skilled in gender programming*, the Master Checklist that follows is a quick reference tool.

If you are *working with a partner to improve their gender capacity*, use Tip Sheet 5: "Checklist for Evalu-

ating An Institution's Capacity to Promote Gender Equality" as a diagnostic tool. This will let you identify your partner's institutional strengths and weaknesses and areas where you can help. Then refer to Tip Sheet 8: "How to Improve Partners' Institutional Gender Capacities" to develop a plan of action with your partner.

You can also use the manual to *develop gender equality workshops with partners.* Suppose you are providing training on how to undertake gender programming or conduct leadership workshops for women trade unionists. The Definitions and Tip Sheets in Part 2 and the additional resources listed in Appendix B may be especially useful. The Global Office has sample workshop designs that you can use and adapt. The Global Office can identify gender experts in your country or internationally that can be resource persons, educators, and technical advisors.

GENDER POLICY OF THE SOLIDARITY CENTER

The Solidarity Center is committed to the principle that gender equality is a fundamental human right and recognizes that freedom from gender discrimination as embodied in the ILO's Declaration on Fundamental Principles and Rights at Work is one of four internationally recognized labor standards.

Over the years, the Center and its predecessor institutes have designed programs to increase broad-based participation of both women and men in decision-making, union-building, and pro-worker advocacy. The Center has required collection of gender disaggregated participation data in its reporting. The Center recognizes it must be proactive in providing equitable services to women and men, and in ensuring that both are equitable beneficiaries of all of these efforts.

The Center's commitment to gender equality is one of its highest priorities. The Center will strive to integrate gender equity through awareness training of staff at headquarters and in the field; direct application of methods and tools to mainstream gender analysis; regular program reviews by a standing gender analysis committee to assist field staff in properly integrating gender considerations into policy and program design; and periodic internal evaluations to ascertain the course of program impacts, adjusting direction as appropriate.

Gender Programming Master Checklist

For this project or program, I have:

- ☐ a current demographic picture of females and males in the national economy or this sector, including sex-disaggregated statistics and analyses of: workforce participation, employment and unemployment, informal and unpaid work, union density, wages or income, and poverty.
- ☐ a good sense of major economic trends (i.e. levels of investment, rule-changes, macro-economic policy, employment by sector) affecting the formal, informal and unpaid labor markets and how they affect women and men differently.
- ☐ gathered sex-disaggregated qualitative and quantitative data to use as a baseline for evaluating results.
- ☐ male and female contacts inside and outside unions to advise me, including youth, people at different levels of leadership/membership, and people who reflect the racial-ethnic-tribal-religious diversity in the country.
- ☐ used a variety of contacts to define and understand basic survival needs (see definition on p. 6) of women and men workers in partner union(s) and in relevant sectors. This includes understanding where men and women share basic survival needs, and where their needs differ.
- ☐ used a variety of contacts to define and understand the key strategic interests (see the definitions section that follows) of women and men in partner union(s) in the sectors where I want to work. This includes an understanding of where men and women share strategic interests, and where their interests are different.
- ☐ learned the political dynamics and key power relationships in the union(s) or relevant sectors by talking with a range of people. This includes knowing the gender dimension of these dynamics.
- ☐ used gender-sensitive criteria to help prioritize and select effective program possibilities.
- ☐ included women in defining the problem or issue that the program or project is designed to address, and ensuring that women have designated it as a priority.
- ☐ included men in defining the problem that the program or project is designed to address, and ensured that men have designated it as a priority.
- ☐ thought about how elements of this project or program can be used to empower women as a group or through strategic support of women leaders.
- ☐ Ensured that men have have been involved in defining and shaping the proposed intervention.
- ☐ identified ways in which this project could challenge those that benefit from gender inequalities in the union, workplace, at home or in society and prepared for this in my plans.
- ☐ considered whether there might be tensions between men and women's interests or needs in this project and planned for any possible backlash or other forms of resistance.
- ☐ developed appropriate benchmarks or indicators for this project that track and define progress toward gender equality.
- ☐ reported any major lessons, achievements or problems related to gender equality aspects of this project to OPRE and to the Global Office, as well as in the appropriate work reports.

Key Gender Definitions

Gender: Gender refers to our social and psychological identity as males and females – what it means to be masculine or feminine in the society in which we live. Gender is expressed in our behaviors, attitudes, and relationships. Gender is not fixed – it is a social construct, often shaped by other identities such as our class, ethnicity, age and religion. The definition of what is "masculine" and what is "feminine" can and does change over time and across cultures.

Sex: Sex refers to the biological identity of males and females, as manifest primarily by our physical characteristics.

Gender Equality: Gender equality is our goal. Gender equality requires equal enjoyment by women and men of all the opportunities, resources, rights, rewards, goods and services that a society values. Gender equality also means equal responsibility in terms of workloads and energy expended in caring for families and communities. In the world of paid work, gender equality means, among other things, that men and women have equal opportunities for training, hiring and advancement, as well as equal pay for equal work. Gender equality does not mean that men and women become the same, or are treated the same. Nor is there a single model of gender equality for all societies and cultures. Rather, gender equality means that women's and men's opportunities and life chances are equal, that the differences that do exist in their talents, skills, interests, and ideas will be equally valued, and that they have equal opportunities to make choices about what gender equality means and work in partnership to achieve it in their particular society.

Gender Equity: Gender equity is the means by which we achieve equality. It is the process of being fair to men and women. To ensure fairness, measures must often be available to compensate for historical and social disadvantages that prevent women and men from operating on a level playing field. Equity leads to equality, the equal valuing by society of both the similarities and differences between women and men.

Gender Analysis: Gender analysis is the systematic effort to identify and understand the roles and needs of women and men in a given socio-economic context. It can also refer to analyzing the impact of various trends or public policies on these roles, as well as how the roles and gender dynamics within a society will affect public policies and trends. To carry out a gender analysis when developing Solidarity Center programming, it is necessary to:

- collect relevant statistics by sex;
- identify gender differentials and dynamics in the division of labor and the access to and control over resources;
- identify the practical and strategic gender needs of men and women;
- identify the social, economic and political constraints and opportunities facing women and men; and,
- assess the institutional capacities to promote gender equality.

Gender analysis is not a replacement for or an addition to a normal analytical process: it is an essential component of that process.

Gender Mainstreaming: Gender mainstreaming is a strategy for making the concerns and experiences of women as well as men an integral part of the design, implementation, monitoring and evaluation of all policies and programs, so that women and men benefit equally and inequality is not perpetuated. It requires that all aspects of the structure and functioning of an institution are evaluated and possibly changed. While the responsibility for achieving gender equality is diffused throughout an organization in a gender mainstreaming approach, research shows that for mainstreaming to succeed, leadership and buy-in from top management is critical, as is providing sufficient and defined funding, staffing, and authority for monitoring and advancing gender equality goals. Gender mainstreaming does not replace the need for targeted, women-specific policies, programs and facilitating legislation, and it does not do away with the need for gender units or focal points.

Gender Policy: A gender policy reflects an institution's intent to integrate gender considerations in its work. Written policies often include an explicit commitment to gender equality and details about how the institution will operationalize that commitment through its policies, programs, procedures and practices. The statement may include specific benchmarks or objectives.

Gender Programming: Gender programming operationalizes a commitment to gender equality by developing and implementing specific objectives, measures and activities that promote gender equality.

Gender Disaggregated Data: Data that is collected for both women and men and shown separately.

Empowerment: Empowerment is a process of awareness and capacity-building leading to greater participation and decision-making power. It enables people to take control of their lives, set their own agendas, build self-confidence, solve problems, and develop self-reliance. It involves the ability to make choices as well as to define what choices are offered. Women's historic and worldwide exclusion from the institutions and processes of power make their empowerment an essential precondition for gender equality. While only women can empower themselves, institutions can support processes that create space for women to develop their skills, self-confidence, and self-reliance.

Basic survival needs: Sometimes called practical needs, these include, for example: physical safety, nutritious food, shelter, easy access to clean water, health and affordable and accessible health care, and employment or income.

Key Strategic Interests: Interests and needs that typically play out over a longer time horizon, and address a need to: shift relative power between, for example, men and women, or employer and worker; provide equal opportunities; and, eliminate all forms of oppression that hinder men's and women's full humanity.

SOURCES:

Canadian International Development Agency (CIDA), policy on gender equality. www.acdi-cida.gc.ca

The Development Assistance Committee (DAC) Guidelines for Gender Equality and Women's Empowerment in Development Co-Operation, OECD, Paris, 1998.

ILO. "Promoting Gender Equality: A Resource Kit for Trade Unions." Geneva, 2002.

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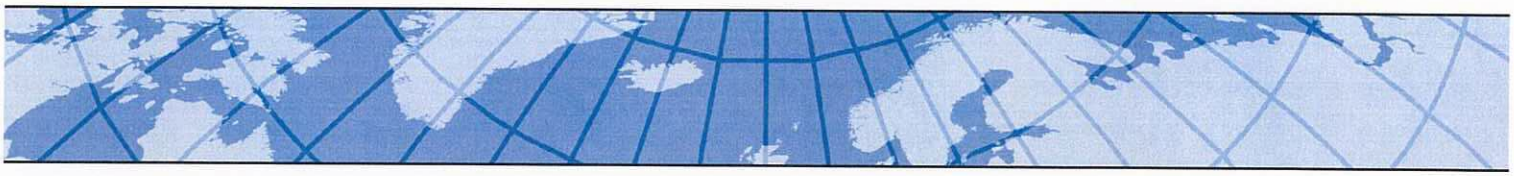
PART 1

The Process: How We "Do" Gender Programming?



OVERVIEW

Gender programming is the practical means of furthering our commitment to gender equality, a foundation of our work to promote worker rights and strengthen unions. Gender programming involves developing and implementing specific plans, goals, objectives, measures and activities that promote gender equality. It is not, as noted earlier, just a new way of talking about women's programs. Gender programming recognizes that men as well as women are socially and economically disadvantaged, and that both men and women have the right to live free from poverty and repression and gender-stereotyped roles. Gender programming can help us address the ways in which men are being undermined and marginalized by deep social and economic changes that provide no place for men in their traditional role and no alternative roles in this new world. In Eastern Europe, for example, dramatic increases in death rates among men are traced to precisely these changes. For men and women, gender equality can mean survival.

Gender programming recognizes that men as well as women are socially and economically disadvantaged, and that both men and women have the right to live free from poverty and repression and gender-stereotyped roles.

To help clarify and focus the approach to gender programming, the authors have divided the process into three (3) steps and included specific tools to help SC staff and partner organizations.

Step 1: Conduct a **gender analysis** on issues related to your work that includes: sex-disaggregated data on workers' labor market status and trends; the practical needs and strategic interests of women and men; and, the different social, economic, political constraints and opportunities facing women and men. As a bridge to Gender Programming Step 2, tools are included to help sift through competing needs and priorities in a way that brings a gender analysis into decisions about how best to strengthen the labor movement.

Step 2: Then use your new gender information and analysis to **design or modify programs** and projects so they promote gender equality. This means setting gender-inclusive long-term goals and objectives/results, and designing activities in a way that addresses them.

Step 3: And, finally, develop indicators to **track your progress** in promoting gender equality, and create feedback mechanisms to help make "mid-term corrections".

STEP 1

Conducting a Gender Analysis

WHAT IS GENDER ANALYSIS?

A gender analysis is a systematic effort to identify and understand the roles, needs, opportunities, and life circumstances of women and men in a given – or more often a changing – socio-economic context. In addition to collecting relevant statistics (i.e. unemployment rates, pay rates, percentage of men and women in a given sector, etc.) it includes identifying:

- gender differences in the division of labor and the access to and control over resources;
- practical needs and strategic interests of women and men;
- power differentials and dynamics between men and women;
- social, economic, political constraints and opportunities facing women and men; and
- assessing institutional capacities to promote gender equality.

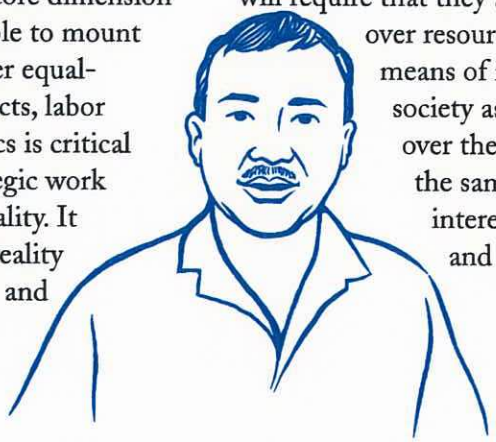
WHY IS CONDUCTING A GENDER ANALYSIS IMPORTANT?

A gender analysis is an essential component of (not a replacement for or addition to) an overall analytical process that a successful program of social change requires. It is a simple equation, really: if we do not fully understand the trends and dynamics that define and perpetuate gender inequality – a core dimension of labor exploitation - we will be unable to mount a successful strategy to promote gender equality and worker rights. Knowing key facts, labor market trends, and the power dynamics is critical for grounding the analytical and strategic work of gender equality programming in reality. It also helps develop a snapshot of that reality against which the impact of programs and strategies can be measured.

WHAT DOES CONDUCTING A GENDER ANALYSIS ENTAIL?

Undertaking a gender analysis to ensure quality gender programming will likely require, as a first step, searching out new and sex-disaggregated data and labor market trends and broadening the list of contacts and information sources to include people in academia, government, women's organizations, labor-support organizations, and other social movement groups. For Solidarity Center staff new to a country, a gender analysis will likely require an initial investment of several days of concentrated research – as well as information gathering over the life of the program. However, this is no different from learning any new skill or topic. Once you become comfortable with gender analysis, it will be an integral part of, rather than an addition to, your job.

An important aspect of gender analysis for program design is a consideration of the difference between basic survival needs and key strategic interests for both men and women. Basic survival needs, also called "practical needs", include, for example, physical safety, nutritious food, shelter, easy access to clean water, health and affordable and accessible health care, and employment or income. Strategic interests, typically, play out over a longer time horizon, and address a need to shift relative power, provide equal opportunities, and eliminate all forms of oppression that hinder men and women's full humanity. For women, this will require that they achieve access to and control over resources and opportunities, both as a means of increasing their relative power in society as well as to gain greater control over their own lives. While the goal is the same, programs that address these interests will look different for men and women.

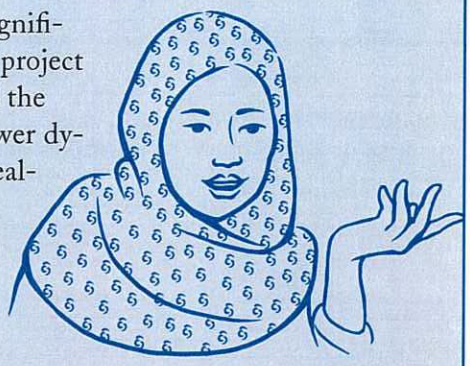


EXAMPLE: SC Program Built Around Women's Basic Survival Needs

This example looks at the practical need for women to avoid contracting HIV. By undertaking a gender power analysis, staff realized that only by addressing women's strategic interests for more control over their lives could they advance the program's goal.

Trade unions in several African nations have made AIDS education a priority among their members and in hard-hit communities where members live and work. One such SC-supported effort was designed to meet the needs of women. Initially, the program focused on women for several reasons, including that women were the fastest growing segment of the population contracting the disease. Increasingly, women also had to raise families alone – as mothers, as grandmothers. Cultural traditions also meant that they were the primary caregivers for those who were sick and dying, as the government's health care budget and system could not cope with the pandemic.

In the early stages of this new SC program, one main strategy was to focus on teaching women how to protect themselves from contracting HIV. During a program evaluation, however, it became clear that this strategy was having very limited success. The rate at which new women in the target area were being diagnosed with HIV was not diminishing significantly. When project staff examined the underlying power dynamics, they realized that their educational program did not recognize the sexual power imbalance between men and women. They decided to address this directly by revamping their program. In phase two, the staff created educational workshops for male-only audiences to address their behavior and consciousness. The SC staff now reports much greater success.



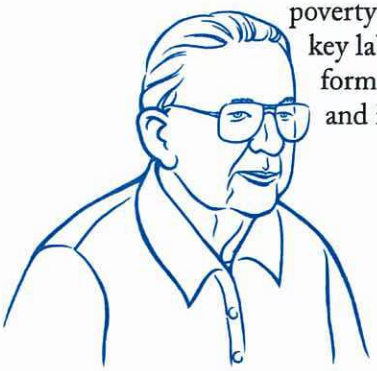
In another program, a gender analysis led union HIV educators to bring husbands and wives together in Couples Workshops to learn about the disease and related issues. This enabled the couples to understand and jointly develop ways to address issues such as the high risk married women face of contracting HIV from their husbands, how to care for themselves and other family members with the disease, and how to prevent the spread of HIV in their family and communities.

Another central part of a strategic gender analysis –by which we mean an analysis whose purpose is to help inform and shape a process of social change – is looking at social, economic, and political power dynamics. Certainly, trade unions have historically understood that addressing practical needs and strategic interests in the fight for worker rights requires a clear analysis of the many faces and manifestations of power — many of which in the right circumstances can be used to promote social good. Identifying the dynamic of both employer and worker power is a key element in most successful organizing campaigns. This same principle applies to gender equality. Understanding the role of gender in power relations – who has power, how do they keep it, how do you build power, what kind of power helps the greatest number of people – will help us best use our own power in the service of gender equality and worker rights.

Finally, as you integrate the information and insights from the gender analysis into your Field work, new program ideas will begin to gel. Using a strategic gender screen will help you prioritize and choose the most effective program option.

Summary of Tools and Tip Sheets to Help Undertake a Gender Analysis

Tool 1: **Sex Disaggregated Baseline Labor Market Data and Trends**
This tool will help you identify key quantitative data on gender differences in: workforce participation rates; unemployment; wages; incomes; poverty rates; union density: and key labor market trends in the formal and informal economy, and in unpaid work.



Tool 2: **Partner's Practical Needs and Strategic Interests Survey**
Sample questions to determine women's and men's needs and interests, possible actions to meet them, and where there is political energy and movement to tap.

Tool 3: **Key Political Dynamics Questions**
These questions help identify who has power and who doesn't inside and outside the labor movement; to learn from those who don't have power as well as those who do; and to think carefully about the strategy behind any activities you are contemplating. The information you derive from this will help you identify possible audiences; allies; and decide how to set priorities for your work.

Tool 4: **Strategic Gender Screen for Selecting Issue and Program Priorities**
The criteria in this checklist will help you narrow various options regarding program directions and activities to select those with the greatest chance of success and the greatest impact. The criteria can also be used to help set benchmarks or indicators.

Tip Sheets are found in Part 2 of the manual.

Tip Sheet 3: **Checklist for Assessing Your Contacts**
Some helpful guidelines to test whether you have a broad enough base of people from which to gather ideas, plan, or strategize.

Tip Sheet 4: **Gathering Quantitative Date For a Gender Analysis**
Lists data sources and provides key labor market definitions.

TOOL 1

Sex Disaggregated Baseline Labor Market Data and Trends

WORKFORCE PARTICIPATION

SOURCE(S):	% MALE	% FEMALE
Formal Economy Workforce		
Informal Economy Workforce		
Formal Economy by sector/Industry:		
Mining		
Manufacturing		
Export Assembly		
Handicrafts		
Construction		
Export Agriculture		
Agriculture for Domestic Consumption		
All Agriculture		
Service		
Trade		
Transport		
Other		
Informal Economy Workforce Participation by Sector		
Mining		
Manufacturing		
Export Assembly		
Handicrafts		
Construction		
Export Agriculture		
Agriculture for Domestic Consumption		
All Agriculture		
Domestics		
Street Vendors		
Service Overall		
Public Sector		
Private Sector		

BURDEN OF UNEMPLOYMENT BY GENDER AND REGION

SOURCE(S):	URBAN	NON-URBAN
Men %		
Women %		

UNION DENSITY BY SEX

NOTE: THIS INFORMATION SHOULD BE COLLECTED FOR DIFFERENT SECTORS	% MALE	% FEMALE
Percentage of All Male and Female Workers in Unions		
Percentage of Union Membership		
Percentage of Union Shop Floor Leadership		
Percentage of Industry-Level Union Leadership		
Percentage of Union Federation Leadership		

WAGE OR INCOME DATA IN U.S. DOLLARS

SECTOR	% MALE	% FEMALE
Formal Economy (Urban)		
Informal Economy (Urban)		
Formal Economy (Non-urban)		
InformalEconomy (Non-urban)		
Formal Economy - Domestic (Urban)		
Informal Economy - Domestic (Non-urban)		
Formal Economy Agriculture		
Informal Economy Agriculture		

POVERTY RATES

SOURCE(S):	URBAN	NON-URBAN
Percentage Living in Poverty (out of total population)		
Percentage of the Poor (out of the total number of poor)		

Following are key questions about trends in labor markets to consider in your gender analysis.

1. What are the key trends or issues for women workers (i.e. unemployment; job growth sectors; wages; benefits; and working conditions) as regards:
   - privatization trends
   - sub-contracting trends
   - growth in the informal labor market
   - migrant work

2. What are the key trends or issues for men workers (i.e. unemployment, job growth sectors; wages; benefits; and working conditions) as regards:
   - privatization trends
   - sub-contracting trends
   - growth in the informal labor market
   - migrant work

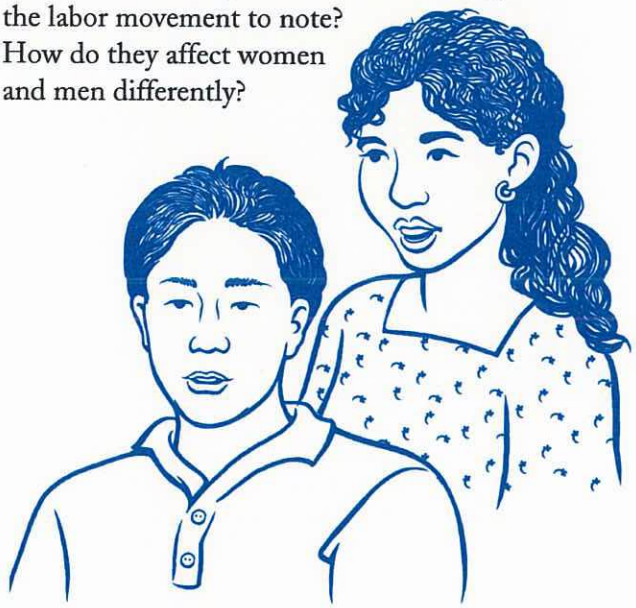
3. What is happening to the overall size of the informal economy? Is its relationship to the formal economy changing? What gender issues or dynamics are at play here?

4. What are the major types of unpaid tasks WOMEN or GIRLS [primarily] perform at home and in the community in this country?

5. What are the major types of unpaid tasks MEN or BOYS [primarily] perform at home and in the community in this country?

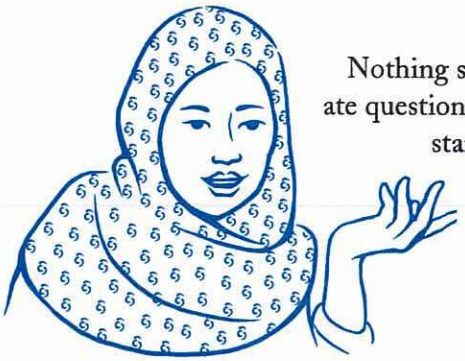
6. Have recent economic changes resulted in shifts in the amount and allocation of unpaid work performed in this country by women and men? If so, how and why? Is there any kind of issue for trade unions here?

7. Are there other important trends affecting the labor movement to note? How do they affect women and men differently?



TOOL 2

Partner's Practical Needs and Strategic Interests Survey



Nothing substitutes for careful listening and the ability to spontaneously craft appropriate questions in face-to-face discussions with your contacts. Still, asking your contacts a standard set of questions can give you a good sense of the multi-layered reality of gender issues. The questions below can help you gather information from partners on the practical needs and strategic interests of men and women workers.

1. What is the most pressing need for women workers today in (the country) from your perspective?
2. Why? Is there information that documents this?
3. How has this need been addressed to date?
4. What do you think is the best way to address this need?
5. Describe the next two most pressing needs for women workers and what has been done to address these needs so far.
6. Where do you find hope? Where do you see change happening in improving the lives of women in (name of country)? Who or what groups are behind this change?

Ask these same questions of and about men, but ask them separately. You are likely to get better information.

TOOL 3

Key Power Dynamics Questions

While the questions below focus on political dynamics around gender in a particular country, they adapt to assess other socio-economic dynamics that affect this work (e.g. racial-ethnic-tribal differences, religious, caste, or geographic/regional inequalities, etc.). It is important to note that all people who belong to a certain group (e.g. a particular sex, religion, tribe) are not homogenous in their outlook or interests, so you will need to be sensitive to how other socio-economic factors play themselves out in people's answers.

It is also important to note that power is not a monolithic force, but rather a complex and ever-shifting web of forces. The point here is not to be able to write a dissertation on power relationships in your country, but rather to get as clear a picture as possible of the terrain and dynamics in operation – and to be alerted to the types of power dynamics that affect our work.

1. What types of cultural power do the following groups of people in your country have? What types of economic power? What types of political power?

   Identities

   - ☐ Gender
   - ☐ Religious Groups
   - ☐ Caste/class
   - ☐ Racial-ethnic-tribal
   - ☐ Immigrant/migrant/native
   - ☐ Married/unmarried
   - ☐ Geographic/regional
   - ☐ Age and generational cohort
   - ☐ Other Key Identities

2. Which of the identities in #1 are the privileged groups in this society (in terms of power, wealth, influence)? Make note of them.

3. From which groups does the majority of labor leadership come in this society?Does this differ from the identity of the privileged groups? If so, how?

4. Does the social and economic identity of shop-floor, local union, industry-level union leaders, and federation-level labor leaders vary significantly from the social and economic identity of rank and file workers? If so, how? How might this affect organizing priorities, definitions of issues, etc?

5. Within the labor movement, are there unions with a significant female membership? Which sectors are they in? What are the priorities and issues of these unions?

6. Are there structures in place in the union movement to ensure good dialogue and communication with rank and file workers? Are there mechanisms to hold leaders accountable to members?

7. Within the labor movement, in which positions are the most senior or prominent female labor leaders? Do you talk with them regularly? What are their priorities? Why are these priorities important to them? How strongly do they identify with and promote gender equality?

8. Which social groupings of women tend to be excluded or ignored by the labor movement in your country? Why? What roles do these women play in the economy? Are they organized in any kind of group or groups? If so, what are their existing priorities, programs, campaigns? How do their interests fit with your current work plan? How do their interests fit into the plans of the labor movement in your country?

9. Who are the leading advocacy groups (NGOs, non-profits, CBOs) in your country that are advancing women's concerns, women's voices? Are you in regular contact with the leadership of these groups? What are their key issues, priorities, programs, and campaigns? How does this fit with your current work plan? How does the social profile of these groups compare with the privileged groups you identified in #1 above? Do you need to make new efforts to reach out to non-privileged groups of women? What do labor unions in your country think about these advocacy groups?

10. What are the most effective channels (types of organizations) for women to organize politically in this country (at the local, regional, and national levels)?

11. Do national unions have any ongoing relationships with the organizations you just identified?

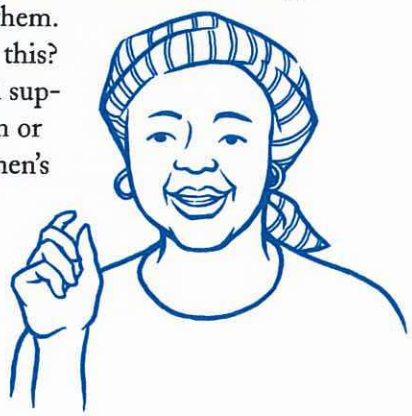
12. What can unions learn from these organizations in terms of nurturing female leadership and advancing gender equality?

13. Around what issues are women showing political energy and power in this country?

14. How does this compare with the issues that receive the most political energy, time and financing within unions?

15. If there is a gap here, why does it exist? How might your programming help to close the gap?

16. Sometimes groups focusing on the needs of women, children and/or families identify pressing practical or strategic needs of men that some unions may be slow to recognize and articulate, but might respond once hearing them. Have you encountered this? How much energy and support exist for a program or project that advances men's needs and interests?



TOOL 4

Strategic Gender Screen for Selecting Issues and Program Priorities

To whittle down the large number of program ideas that may be generated in the strategic analysis, try using the following strategic screen or filter. This can be used to prioritize possibilities by their relative importance as well as to weigh which options and ideas have the most support in terms of social energy and sustainability. These criteria can also be used to evaluate ideas and proposals that partners bring forward as well as to develop benchmarks.

Will the envisioned program/activity/issue:

- ☐ result in a real improvement in working women's/men's lives?
- ☐ encourage more women to join unions?
- ☐ result in working women getting a sense of their own power?
- ☐ tap into and respond to strongly held values for women/men?
- ☐ create or enhance women's strength within a union or other labor organization?
- ☐ create opportunities for women to get involved in policymaking on all levels in the union?
- ☐ develop new female leaders (inside or outside the union)?
- ☐ develop gender-aware male leaders willing to work for gender equality?
- ☐ promote awareness of and respect for women's practical needs and/or strategic interests?
- ☐ promote awareness of and respect for women's rights?
- ☐ promote awareness of and respect for men's practical needs and/or strategic interests?
- ☐ have a clear target and time frame?
- ☐ build the capacity of union partners to promote gender equality in the union/workplace/society?
- ☐ result in collective bargaining with specific provisions to help balance family and work life for men and women workers?
- ☐ have the potential for implementation and success?
- ☐ Other:

Source:

Adapted from "A New Weave of Power, People and Politics", by Lisa Veneklasen with Valerie Miller, World Neighbors, 2002, p. 162.

STEP 2

Gender Programming: Applying What You Know

WHAT IS GENDER PROGRAMMING?

Gender programming is a means for implementing the expressed commitment to gender equality by developing and implementing specific plans, measures and activities that promote gender equality. It is based upon the information and understanding gained in a gender analysis. As such, it takes into consideration the current conditions and challenges facing female and male workers, and the gendered power dynamics operating at multiple levels that must be addressed.

WHY IS GENDER PROGRAMMING IMPORTANT?

Gender programming is key to effectively addressing gender discrimination at work and in society, and to defending and enhancing worker rights overall. Because women's labor market status sets the "floor" for both men and women, workers' status will only be improved by raising the floor, both absolutely and relative to men. This requires well-planned program and project interventions that explicitly address gender inequality.

WHAT DOES GENDER PROGRAMMING ENTAIL?

Initially, paying careful attention to gender requires making time to gather information, consult with others, and evaluate program options more consciously. In the end there will be positive payoffs. You will avoid pitfalls, negative reactions, and poor design that can cost you money, time, effort, and goodwill.

When designing or revising a program, refer to the following principles for guidance. This will help create coherence in the work to support gender equality while allowing for maximum flexibility at the program level. These principles also can be shared with partners to build collaborative programs and projects in support of gender equality.

GUIDING PRINCIPLES OF GENDER PROGRAMMING

- Gender equality can only be achieved through partnership between women and men, and requires recognition that every policy, practice, program and project may affect women and men differently.
- Promoting the equal participation of women and men as agents of change in economic, social, and political processes within unions, the workplace, and in society is essential to achieving gender equality.
- Achieving gender equality does not mean that women become the same as men, but it does require specific measures designed to eliminate gender inequalities.
- Women's empowerment, as well as sharing power and responsibility in a balanced way between the sexes, is central to achieving gender equality.

Sometimes gender programming involves meeting the survival needs of both men and women in the same program, but with different approaches that recognize different gender roles, as in the HIV programs. Examples of programs to address practical needs include:

- Legal challenges to help workers receive back pay
- Stopping sexual harassment
- Addressing environmental hazards at work
- Advocating for workers' reinstatement after unlawful dismissal
- Stopping pregnancy testing of employees, or as a condition of employment.

At other times, a specific program may be geared towards women or men because their survival has been differently affected by government policy (e.g. structural adjustment or privatization), corporate actions such as layoffs, or labor market trends.

EXAMPLE: Programs to address men's strategic interests

- Expanding "maternity" leave to "parental leave" in contract language so men can have time to care for family members too.
- Training men for what are typically "women's jobs" (i.e. health care or export assembly jobs) so that men have access to jobs in growth sectors.

EXAMPLE: Programs to address women's strategic interests

- Training women for leadership.
- Helping to establish and finance a network of union women.
- Engaging women in advocacy and global economy educational processes that help them gain a strongvoice in economic policymaking.

Summary of Tools and Tip Sheets to Use in Gender Programming

Tool 5: **Gender Programming Worksheet**
Critical issues to consider to take gender equality fully into account when developing the long-term goal, objectives, activities and evaluation and monitoring a gender-equality enhancing program.

Tip Sheets are found in Part 2 of the manual.

Tip Sheet 5: **Layers of Power**
In order to develop effective strategies for change, the different layers of power need to be understood and addressed. This Tip Sheet outlines different layers of power, the ways they are expressed, and illustrative strategies for addressing them.

Tip Sheet 6: **Responses to Partners' Concerns**
This Tip Sheet helps clarify for us and our partners how and why women and men both need to be fully integrated into gender programming.

Tip Sheet 7: **Checklist for Evaluating a Partner's Capacity to Promote Gender Equality**
What to consider when working with a new partner or supporting an existing partner in accomplishing gender equality goals.

Tip Sheet 8: **How to Improve Partners' Institutional Gender Capacities**
This helps consider institutional mechanisms to advance gender programming and how to create or strengthen gender structures within trade unions and confederations.

Tip Sheet 9: **Guidelines for Gender-Inclusive Research**
Use these guidelines to ensure that labor and/or economic research projects advance gender equality.

Tip Sheet 10: **Gender Issues in Preparing to Negotiate a Collective Bargaining Agreement**

Tip Sheet 11: **Gender Equality Bargaining Checklist**
The ILO has developed detailed checklists and other resources to help in gender-inclusive program design for key labor issues such as collective bargaining. We have included two of these checklists in this manual. See Appendix B for information on how to access the full range of excellent ILO gender materials.

TOOL 5

Gender Programming Worksheet

The following worksheet can be used to establish goals, objectives, and activities that are more gender inclusive. Relevant definitions are listed below:

Goal: Generally refers to the long term, big picture, broad-brush version of what you hope to accomplish – the ideal, i.e. gender equality

Objectives: USAID uses the term "results', as in "desired result". This is what we hope to accomplish within a finite time period, expressed in concrete terms. It is something that is within our power to accomplish.

Activities: What we're doing in order to accomplish our objectives. May refer to the work of staff or partners.

Monitoring: The regular collection, analysis and distribution of information and data on the progress of the activities and programs implemented.

Evaluation: Evaluations establish whether the positive outcomes planned by the project have been achieved.

ESTABLISHING LONG-TERM GOALS

- This project has as its long-term goal:
- Key groups of women were consulted in defining the problem/issue. Yes No
- This is a priority for key groups of women: Yes No
- If yes, which groups:
- Key groups of men have been consulted about defining the problem/issue. Yes No
- This a priority for key groups of men: Yes No
- If yes, which groups:

ESTABLISHING OBJECTIVES/RESULTS

- Women's *practical needs* related to this problem/issue are:
- Women's *strategic interests* related to this problem/issue are:
- Men's *practical needs* related to this problem/issue are:
- Men's *strategic interests* related to this problem/issue are:
- The gender needs/interests listed above that are used in setting my objectives is/are:
- The objectives for the program/project are:
- Key groups of females (if they are to be the project beneficiaries) have been involved in helping shape the solution or proposed intervention (i.e. objectives or results). Yes No
- Key groups of males (if they are to be the project beneficiaries) have been involved in helping shape the solution or proposed intervention (i.e. objectives or results). Yes No
- Tensions arising between groups of women, men, or between women and men related to the objectives for this project include:
- These power dynamics (tensions) will be addressed through:

DESIGNING ACTIVITIES TO ACCOMPLISH OBJECTIVES

- Research has been conducted on whether this project or program can capitalize upon related gender equality actions, campaigns or programs by other organizations (at local, regional, national, international level). Yes No
- In the work plan, key women were included to help identify opportunities or entry points to reduce inequalities and/or empower women (socially, politically, economically). Yes No
- This program or project's work plan does not reinforce existing gender stereotypes at home, at work, in the union or in society in general. Yes No
- There are opportunities to break down gender-related barriers for men in this project. Yes No

- If so, what are they and how can they best be undertaken?

- If appropriate, key groups of women have been involved in developing the work plan. Yes No

- Their recommendations related to their gendered needs and interests are:

- If appropriate, key groups of men have been involved in developing the work plan. Yes No

- Recommendations from men related to their gendered needs and interests are:

- The following steps will be taken to ensure women's involvement in implementing the program (as trainers, leaders, participants) [as appropriate for the program], given, for example, the hurdles they face in the union, at work, within their families, and/or as a result of cultural customs, etc:

- If this is a training project involving both women and men, logistical arrangements are being made using specific educational and administrative methods to enable women to fully participate. Yes No

MONITORING AND PROJECT EVALUATION

- Qualitative or quantitative data exists to establish a baseline to evaluate achievement of the objectives/results. Yes No

- The baseline data disaggregated by sex and other relevant demographic factors. Yes No

- Gender-sensitive indicators have been created to determine whether the objectives have been met. Yes No

- Women have been involved in selecting or defining these indicators. Yes No

- Women will be involved in project monitoring and evaluation. Yes No

STEP 3

Using Indicators to Track Progress Toward Gender Equality

WHAT IS AN INDICATOR?

An indicator is a yardstick or perception that progress is being made toward a specific objective over time. USAID uses the term "benchmark". Benchmarks and indicators provide a way to examine the results of activities or actions. **Quantitative indicators or benchmarks** are concrete, often dealing with numeric values, such as the number of people trained.
Qualitative indicators or benchmarks can be defined as people's judgments and perceptions about a subject, such as confidence workers have in the ability of their unions to represent their interests. These two types of indicators complement one another, and both are important for effectively monitoring and evaluating our programs.

Gender-sensitive indicators are used to track progress toward promoting gender equality in projects that have explicit objectives for equality, as well as those with other objectives.

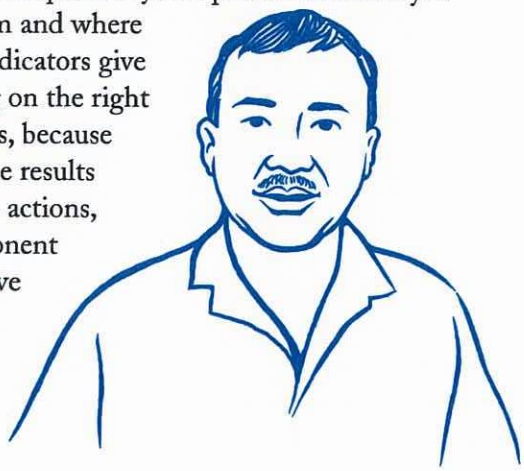
WHY IS TRACKING PROGRESS IMPORTANT?

As noted above, in order to successfully promote gender equality, projects need to be explicitly and intentionally gender-inclusive in all stages of program analysis, design and development. Similarly, projects need to be explicit in monitoring progress, and that requires identifying and using appropriate gender-sensitive indicators or benchmarks. They can help ensure that programs are implemented well and the objective of furthering gender equality is achieved, and that problems that may be fixed by retooling or shifting activities and resources are identified. Good indicators also provide a key feedback loop for future program design.

By providing concrete measures of the progress toward gender equality, indicators can also help in establishing and maintaining accountability to donors, and to the partners engaged in this process of profound social change.

WHAT DOES TRACKING PROGRESS ENTAIL?

Measuring progress towards achieving specific objectives requires regular monitoring, matching actual progress against benchmarks or indicators at each different stage of the project, and evaluating outcomes once the project is over. Indicators should derive from reliable, relevant and gender-disaggregated baseline information and analysis, clear program objectives and effective program plans developed using Steps 1 and 2. These steps will provide you a picture of where you are starting from and where you're going. Indicators give a sense of being on the right road. Indicators, because they point to the results of activities and actions, are a key component of comprehensive monitoring and evaluation.



SUMMARY OF TOOLS AND TIP SHEETS FOR TRACKING PROGRESS TOWARD GENDER EQUALITY

Tool 6: **Sample Questions for Evaluating the Gender Impact of Projects and Reporting Outcomes**
Regardless of whether the project focus is gender equality or whether gender has been "mainstreamed" into a project with a different focus, use these questions to spur your thinking about what to report. Addtional information useful in developing indicators and tracking progress are found in Part 2.

Tip Sheets are found in Part 2 of the manual.

Tip Sheet 12: Questions To Evaluate Trainings
Training is a major component of many SC programs. Consider using these questions as part of written and oral evaluations immediately after the training and in follow-up evaluations.

Tip Sheet 13: Indicators of Participation and Empowerment
Includes a list of indicators that can be used to measure the effectiveness of a range of empowerment and participation programs.

TOOL 6

Sample Questions for Evaluating the Gender Impact of Projects and Reporting Outcomes

1. How did this project change women's lives and the opportunities they have? Did this change their perceptions of themselves? If so, how?

2. How did this project change men's lives and the opportunities they have? Did this change their perceptions of themselves? If so, how?

3. Did gender inequality change at all as a result of this project (socially, politically, and/or economically)? If so, how? Why? What are the lessons here?

4. Did you directly observe these changes? Did you indirectly observe these changes? How do you know they occurred?

5. How did the women and men participating in the project evaluate its impact? Is this different from your assessment? Or the assessment of key decision-makers or leaders in the project?

6. Who, in reality, benefited from this project the most (types of people and numbers)? What was the distribution by sex, age, racial-ethnic group, union status, etc.? How did this compare with the intended beneficiaries? How do you explain any difference between the actual and expected people benefiting from the project?

7. Were there any people unintentionally hurt or excluded from participating in this project (types of people and numbers)? What was the distribution by sex, age, racial-ethnic group, union status, etc.? How do you explain this in retrospect? Lessons here?

8. What were some of the gender-based resistances or "push-backs" that you encountered? Were these foreseen? How did you deal with them? What lessons do they offer for future projects?

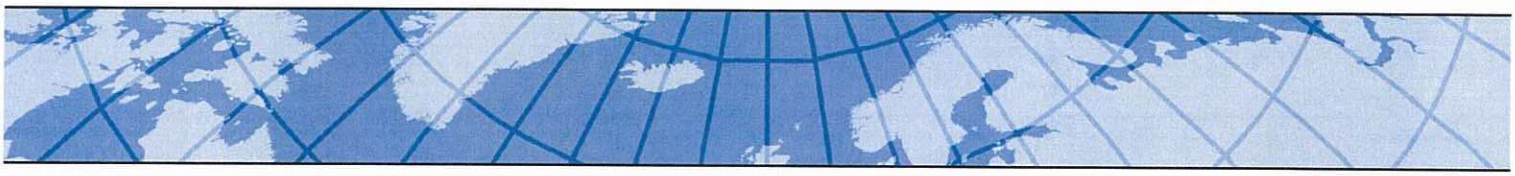
9. Were there any unplanned successes related to gender? Any lessons here?

10. Who needs to hear the successes, failures, highlights, lessons learned – among partners, SC staff in field, SC headquarters, funders, etc.? How do you plan to communicate these?

NOTES

PART 2

The Content: Tip Sheets with Gender-Relevant Information and Advice



OVERVIEW

Part 1 of the manual helped you analyze gender issues and integrate them into SC programs and projects. In this section are Tip Sheets that provide information on a variety of gender issues, a rationale for integrating gender considerations in worker rights advocacy, and checklists, including several from the ILO, that provide lots of concrete guidance on gender programming. Here is a list of Tip Sheets in this section.

Tip Sheet 1: Why Including Women and Promoting Gender Equality Are Important to the Labor Movement

Tip Sheet 2: Is Gender Programming Only About Women? No! Here's Why

Tip Sheet 3: Checklist for Assessing Your Contacts

Tip Sheet 4: Gathering Quantitative Data for a Gender Analysis

Tip Sheet 5: Layers of Power

Tip Sheet 6: Responses to Partners' Concerns

Tip Sheet 7: Checklist for Evaluating a Partner's Capacity to Promote Gender Equality

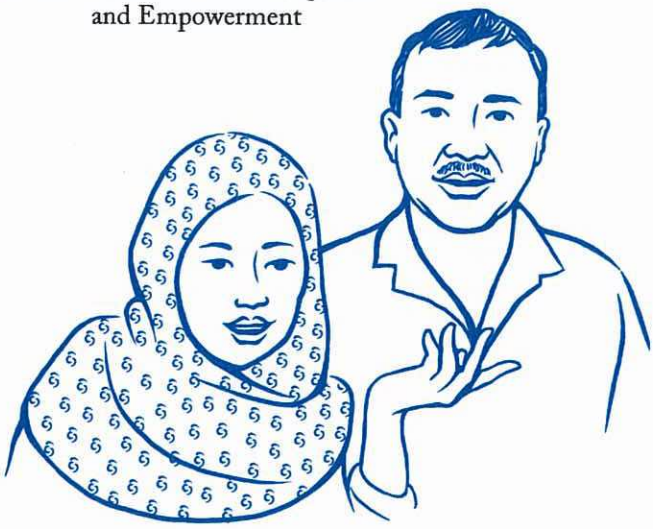
Tip Sheet 8: How to Improve Partners' Institutional Gender Capacities

Tip Sheet 9: Gender Issues in Preparing to Negotiate a Collective Bargaining Agreement

Tip Sheet 10: Gender Equality Bargaining Checklist

Tip Sheet 11: Questions to Evaluate Trainings

Tip Sheet 12: Indicators of Participation and Empowerment



TIP SHEET 1

Why Including Women and Promoting Gender Equality Are Important to the Labor Movement

"Unions can – and must – take up the challenge of transforming the labor market through equality and justice. However, this can only be done if the unions are unified, strong and vibrant. While it is true that women have been swelling the ranks of the unions, much remains to be done to organize them...."
ICFTU 8th World Women's Conference, 2003

1. Gender equality is key to union goals of social and economic justice

Trade unions were founded by workers to fight for their rights and dignity as well as social and economic justice for all people. Because gender inequality is an all-pervasive and destructive form of exploitation and discrimination in the workplace and in society at large, trade unions will only achieve their vision if gender inequality is challenged and overcome.

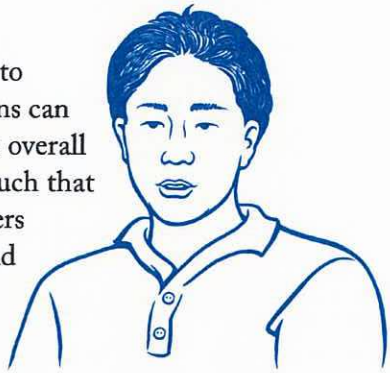
2. Organizing women is key to increasing union membership

Women are the fastest growing segment of the labor force. Between 1980 and 2000, the global labor force participation rates for women increased by 3 percentage points, and declined by 2 points for men. The surge is even greater in some regions, such as Central America, where the female rate jumped by 11 percentage points. Organizing strategies and methods that target women workers are key to tapping this vast pool of unorganized workers.

Women tend to be concentrated in sectors of the economy that are under-organized and under-represented by labor unions. Women workers predominate in formal sector jobs in health, education, and export assembly industries, as well as in the informal economy. Again, organizing strategies and methods that specifically target women workers are key to tapping this vast pool of unorganized workers.

3. Addressing "women's issues" and gender discrimination is an important strategy for strengthening unions in a way that benefits men as well as women

By bringing more women into unions and developing their effective leadership, unions can increase their cross-sectoral economic advantage in collective bargaining and political clout in the democratic process. Due to job segregation and union structures and history, women are concentrated in sectors of the economy often left unorganized or if organized, are not seen as important to a labor movement's national political strategy. Yet, some sectors where women predominate are vital industries – such as export processing zones, banking, telecommunications and public services – that could offer important political muscle in various types of campaigns.



By paying attention to "women's issues", unions can actually strengthen the overall environment at work such that male and female workers can be more unified and powerful in advancing the union's overall interests. Sexual harassment and other forms of intimidation of female workers are degrading and reinforce feelings of inferiority. This weakens women workers' ability to "fight back" on any and all issues at work. Moreover, employers have been known to harass women workers and family members as a way of indirectly intimidating male workers and union leaders. Putting a stop to this safeguards the rights of all workers and strengthens the union.

By addressing the gender gap in wages, unions can halt the continued downward slide in men's wages and working conditions. Regardless of industry or job, women's wages are persistently lower than men's. Employers and politicians can threaten men directly or indirectly by playing the "gender card" – hiring women at lower wages and with fewer benefits or subcontracting out the work to women at home-based enterprises. Various national economic strategies and individual company strategies attempt to boost profits or overall economic growth on the backs of women. This keeps a downward pressure on men's wages and labor standards generally. By organizing women workers everywhere, and championing equal pay, unions can negotiate collective bargaining agreements that reflect economic conditions and provide dignity on the job for everyone.

By working to promote more balanced work and family life for men and women, unions can enjoy the benefits of having more members, and more members who can give time and energy to the union movement. The burden of domestic work in the home is not balanced between males and females. Competition for their time can make it difficult to organize women workers and for women to be active members of unions.

4. Freedom from discrimination is an internationally recognized labor right

It is one of the core labor standards whose principles were reaffirmed in the *ILO Declaration on the Fundamental Principles and Rights at Work*, which was adopted by all the member states of the ILO. Unions need to protect and uphold all labor standards.

TIP SHEET 2

Is Gender Programming Only About Women? No! Here's Why

1. Equality and social justice

Gender programming recognizes that men as well as women may be socially and economically disadvantaged. Both men and women have the right to live free from poverty and repression. Gender equality and empowerment work allows women and men to live full lives, unencumbered by gender-stereotyped roles. Both men and women have the responsibility to understand how they have been hurt, where men (and much more rarely women) benefit from gender privilege at work, in their unions, at home and in their communities, and to be partners in change. For example: men and women benefit from having unions insist on including paternity leaves in collective bargaining agreements. Such a demand may help men address impediments they face in caring for their children and fulfilling family responsibilities.

2. Gender is relational

Focusing only on women's needs, roles and opportunities is insufficient for the task of achieving gender equality. A better understanding of men's perceptions, positions, interests and needs and the scope for changing these is essential.

3. Gendered vulnerabilities

Evidence from several studies suggests that while women workers in general face greater social and economic disadvantages, men are not always the winners. Generalizing about their situation risks overlooking gender-specific inequities and vulnerabilities that unions need to address. For example, occupational segregation and industrial segregation mean that men may be exposed to certain hazards in greater numbers than women, and that biological differences may produce different health effects. Male banana workers, for example, found that certain pesticides rendered them sterile. Because of the types of jobs women workers hold in the industry, they are not exposed to these harmful chemicals. To be clear, unions need to address both the symptoms of the inequities (in this case health problems) as well as the underlying causes (lack of proper health and safety standards in the workplace and a gendered division of labor).

4. Crisis for men

Changes in the economy, social structures, and household composition are resulting in a crisis for men in many parts of the world. The debilitating effects of poverty, economic and social change may be eroding men's traditional roles as providers and limiting the availability of alternative, meaningful roles for men in families and communities. In Eastern Europe, dramatic increases in death rates among men is traced to precisely these changes. For men, as well as for women, gender equality can be a question of survival.

5. Strategic gender partnerships

To achieve gender-equitable change in the household, workplace, labor movement, and communities, men and women will need to work as allies and partners. For example, to increase the number of women in union leadership positions, women will need to be encouraged and trained as leaders, and men will need to accept women as leaders and vote for them in union elections. Similarly, if men want to assume more nurturing roles in the home, women will need to encourage and support men in that role.

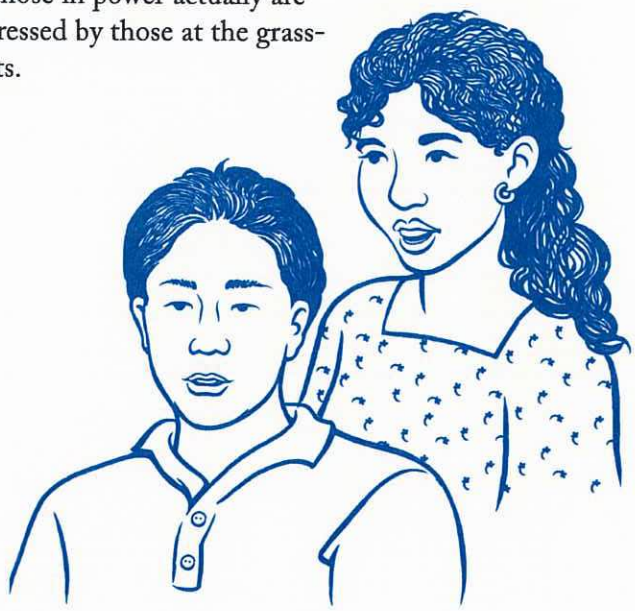
Adapted from: Frances Cleaver, "Do Men Matter? New Horizons in Gender and Development." December 2000, Insights, #35 (www.idi21.org/insights/insights35).

TIP SHEET 3

Checklist for Assessing Your Contacts

A broad base of contacts is an important resource in gathering information for a strategic gender analysis. Use this checklist to evaluate whether you have all the contacts you need, or whether additional outreach may be necessary.

- ☐ I have good sources of information inside and outside the labor movement who represent privileged groups.
- ☐ I have good sources of information inside and outside the labor movement who represent major categories of non-privileged groups.
- ☐ I have many sources/contacts who can knowledgably discuss working women's distinct needs.
- ☐ I have many sources/contacts who can knowledgably discuss working men's distinct needs.
- ☐ I have regular contact with leaders in unions predominated by women workers.
- ☐ I have regular contact with female labor leaders.
- ☐ I have regular contact with groups of women workers who tend to be excluded or ignored by the labor movement in this country.
- ☐ I have regular contact with the leading advocacy groups (NGOs, non-profits, CBOs) in this country that are advancing women's concerns, women's voices.
- ☐ I have explored whether there are groups of male workers who tend to be excluded or ignored by the labor movement and have regular contacts with them, if such groups exist.
- ☐ I have contacts both with top-level labor leaders and lower ranking ones, and/or with rank-and-file workers so I can check that the needs identified by those in power actually are expressed by those at the grassroots.

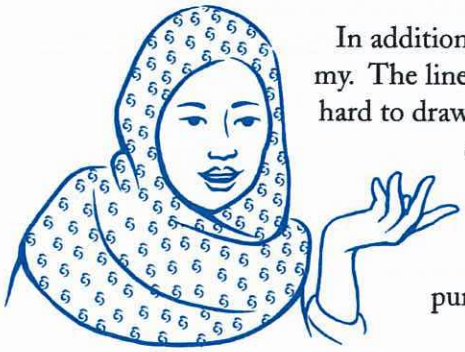


TIP SHEET 4

Gathering Quantitative Data for a Gender Analysis

Basic data about the status and trends for men and women workers will help ground SC work in the overall macroeconomic realities of the country. Data can be gathered from a variety of sources, including the ILO, trade union partners, academic researchers, government statistical bureaus, other agencies of the United Nations such as the UNDP and the Statistical Division of the Department of Economic and Social Affairs, and LSMS and other data sets from the World Bank. The Solidarity Center has put together an electronic database that includes many key variables from these data sets. In addition, the Global Policy Network maintains an up-to-date database of labor market trends in over 40 countries worldwide (www.gpn.org).

In some cases, such as South Africa, data is disaggregated by race and other important socio-economic categories, such as age, urban/rural, and religion. Where available, such data provide important additional insights into the workings of the labor market in the country.



In addition, labor market data is often broken down by the formal and informal economy. The lines between these two economies, traditionally called "sectors," is increasingly hard to draw as casualization of formal labor becomes more the norm, and the informal economy grows in importance as a source of jobs and income for men and women workers. A third category is unpaid labor, which is a significant factor in defining the nature and scope of gender differentials in labor exploitation. The following definitions help clarify these issues for the purpose of gender programming:

Formal Sector/economy: refers to work that is salaried or waged, and subject to national employment laws, regulations, and taxation systems. Those who work in the formal economy, generally, go through some sort of formal hiring process. This is the type of labor that official employment statistics manage to count. It can be in both the private and public sector.

Informal Economy: the definition of informal economy is controversial and in flux. Formally called the informal sector, the informal economy typically refers to economic activities that take place outside the framework of corporate, public and private sector establishments or regulations. This includes paid domestic work, self-employment, petty trading, and very small enterprises (own-account workers or those with a few employees) that rely on family labor and local resources, low capital investments, and labor-intensive technology. Informal economy workers and businesses tend to face a high degree of competition. Informal businesses do not usually comply with established regulations regarding labor practices, taxing and licensing. This work tends to be poorly paid, unstable, and without benefits or health and safety protections. This sector tends to be dominated by women. Illegal paid work such as prostitution, gambling, and drug running exists in what is called the "underground"

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economy, and is included in some definitions of the informal economy, but not ours.

Unpaid labor: refers to labor that is not remunerated such as care of one's own children or elders and housework. Goods produced for one's own consumption, to barter, or as part of customary exchange relationships, are typically produced with unpaid labor. The United Nations Development Program estimated that in 1995, the value of unpaid labor worldwide was $16 trillion ($US), with two-thirds of it done by females. Unpaid labor is a much broader concept than unpaid family labor, but it does include unpaid family labor. Unpaid family labor may be used in the production of goods and services for the market, as when a family member, usually women, works with no compensation to assist in the production of a cash crop sold by another family member. It is unpaid labor, particularly that of women, that provides a "cushion" for economic shocks, poverty-inducing policies, massive layoffs, and other detrimental social and economic changes. As such, it is a key concept and strategic reality that needs to be fully understood and integrated into our analysis of how to bring about positive, pro-worker social change.

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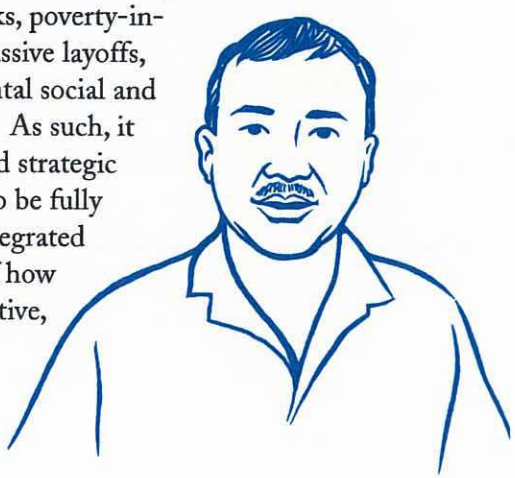


TIP SHEET 5

Layers of Power

In trying to make structural, policy, programmatic or cultural changes to advance gender equality within and outside of worker organizations, it is useful to define the various layers and manifestations of power, in order to develop effective strategies for change.

Layers of Power	Mechanisms for expressing this type of power	Strategies for dealing with this type of power
Visible	This layer is the easiest to see. It consists of formal institutions, officials, and policies that shape the ground rules. In a union setting, this could be the Executive Committee, National Congress, the President and other senior officers of the union. This includes the Constitution and/or By-Laws for the union, and other written policies and budgets that govern how the union functions, spends its money, and implements decisions and programs. Possible forms of gender discrimination can be: biased rules or policies; closed and *unrepresentative decision-making structures.*	1) Monitoring 2) Lobbying 3) Negotiating 4) Education of key decision-makers 5) Voting and running for office 6) Modeling a better way 7) Collaboration among groups
Hidden	These are the unwritten rules, the informal practices, the behind-the-scenes institutions within the institution of the union (or federation) that prevent women from getting to the decision-making table, that prevent gender equality policies, strategies, and programs from being adopted and implemented. These are the hidden actions that exclude and de-legitimize certain people, issues, and perspectives within the union. In some instances, gender equality advocates or their concerns are made invisible by intimidation, misinformation, and/or cooptation	1) Build active constituencies around common concerns to press for change and show power in numbers. 2) Start efforts to hold leaders accountable. 3) Use research findings and disseminate information widely that legitimizes your concerns or ideas.
Invisible	Further below the surface are the processes, practices, cultural norms, and customs that shape people's understanding of their needs, roles, possibilities and actions. This kind of socialization means some union members may feel apathy, self-blame, powerless, unworthy, hostility, anger, or subordination. Examples are: assumptions that women union members will plan and be responsible for celebrations or parties; that women can't be leaders or should not go to trainings because they cannot travel and/or have family responsibilities; that men are more entitled to early retirement bonuses; or that men are more important to organize than women.	1) Education to build confidence, awareness, collaboration among key constituencies 2) Share stories, speak out through alternative forms of media (an in-house women's newsletter, for example). 3) Develop support groups, networks among women members or leaders.

Adapted from "A New Weave of Power, People & Politics" by Lisa VeneKlasen with Valerie Miller, World Neighbors, 2002, pp. 45-50

TIP SHEET 6

Responses to Partners' Concerns

"Why is it that challenging gender inequalities is seen as tampering with traditions of culture, and thus taboo, while challenging inequalities in terms of wealth and class is not?"
— Mona Mehta, University of Baroda, India

As with many organizations, trade unions well-steeped in a commitment to social and economic justice, as well as those that focus more narrowly on the immediate needs of their members, are sometimes resistant to the idea of challenging gender inequality. Among the reasons for the resistance may be a perception that such programs constitute inappropriate cultural intervention. Following are a number of points which can be raised in discussions with our partners to address their concerns.

1. The movement for gender equality is a global, grassroots movement

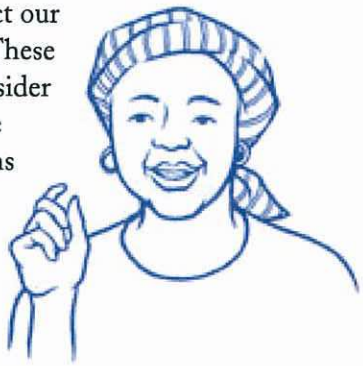
Women in countries around the world are naming and fighting gender inequality, articulating their own visions and solutions for the problems of discrimination and the denial of their basic human and worker rights. Home-grown women's efforts are not always recognized by mainstream media, trade unions, NGOs or officials and politicians in their own country. Often, this lack of recognition reflects the systemic nature of gender inequality and discrimination.

2. There are real and important power issues related to gender (and other identities, such as class, race, ethnicity, and religion) that need to be addressed in any partnership between Northern and Southern organizations, even when they may share many values and goals

Participatory planning processes that integrate local men and women's priorities and solutions can help articulate and address these issues. In so doing, local women and men will be enabled to set their own agendas, and, where appropriate, negotiate joint agendas, rather than just follow the agendas of others. This gender manual includes several tools to help you involve and learn from local women and men as an integral part of program design.

3. Who gets to decide what constitutes "traditional culture" and what about it needs to be protected is a highly political question

Defining and protecting "traditional culture" is a political act. Culture can certainly be manipulated to protect or promote privilege in one or more forms – class, caste, gender, racial-ethnic, or tribal identity, for example. It is therefore important to consider who is raising concerns about cultural imperialism. Do they benefit from traditional privilege? What role do Solidarity Center projects play in efforts to reinforce traditional privilege or overcome it, and does this serve our goal of securing worker rights for men and women? Are we sufficiently mindful of our own culture and how we protect our interests, consciously or not? These are important questions to consider and discuss with partners as we design and implement programs that reflect our values, including gender equality, as well as the values of our partners.



4. **All but the most isolated peoples find that their cultures are often in flux because of internal and external forces.**

Male and female roles, responsibilities, and attitudes change over time because societies and cultures are not static. Natural disasters, technological change, demographic trends, migration, trade and investment, tourism, economic development, international communications, legal decisions, political movements, as well as shifts in religious thinking and institutions are some of the many factors which are constantly remolding cultural mores, practices and institutions.

5. **The Solidarity Center is in the process of learning to address gender concerns as part of its commitment to strengthen worker organizations around the world**

While the SC is committed to gender equality as a goal in its internal operations as well as its program work, it will take time to fully develop requisite skills and capacity. The SC realizes mistakes and missteps will occur, and will make every effort to learn from these mistakes.

Another aspect of partner concerns or resistance may revolve around the question of who is responsible for promoting gender equality.

6. **Having a women's department is a necessary but not sufficient step towards enhancing gender equality**

Women's departments often focus on organizing and training women and, possibly, advocating on their behalf within the union or confederation. Adequately staffing and funding such departments is a critical component of contributing to women's empowerment.

Gender equality, however, refers to the needs and interests of both males and females. It is important that unions be skilled in identifying what both sexes need, and engage in gender mainstreaming initiatives that reduce inequalities throughout their structures and programs. Women's departments cannot do this on their own.

7. **Both men and women are responsible for promoting gender equality**

Effective advocates on behalf of gender equality can be both male and female. It is not fair – and often not accurate — to make assumptions related to a person's skill or commitment to gender equality based on their sex. For example, one cannot assume that a woman leader will champion gender equality in a union. She may not have the interest, skill or authority to make change.

One or a handful of leaders cannot be responsible for transforming an entire union. Clear authority for implementing and monitoring gender policy is needed, and all departments must take responsibility for making change happen.

8. **Respecting the human rights of women is not a "Northern" agenda, but one recognized by international institutions, including the ILO and other UN agencies**

Countries of the Global South and North have agreed to recognize the sanctity of human rights and women's rights through various UN conventions, such as the Universal Declaration of Human Rights, the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) and reiterated their support for non-discrimination as a core labor standard through their adoption of the ILO's Declaration of Fundamental Principles and Rights at Work.

TIP SHEET 7

Checklist for Evaluating a Partner's Capacity To Promote Gender Equality

How well do the culture, structure, programs and policies of a partner union or federation promote gender equality? Use this checklist to evaluate the strengths and weaknesses of these institutions. Place a check in the box if you can answer "yes" to the statement:

1. Mission and policies

- ☐ Gender equality is identified as part of our union's/federation's mission.
- ☐ There are one or more written policies or resolutions related to advancing gender equality within the union/federation. (The title may refer to something similar, such as gender discrimination, gender equity, or affirmative action.)
- ☐ There is significant consistency between theory and practice – that is, between what our gender equality policies say and how they are implemented within our union/federation.
- ☐ There is a process to ensure that all staff and leaders of the organization receive gender training.
- ☐ There is a specific written policy for dealing with sexual harassment among the staff, members, and leaders of the organization.
- ☐ Staff and leaders are evaluated regularly on their performance related to promoting gender equality within the scope of their role in the organization.

2. Representation

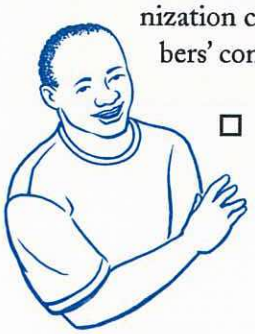
- ☐ Women hold significant leadership positions, in proportion to their membership in the union
- ☐ There are specific policies in place to ensure women are nominated, appointed and/or elected to various leadership positions within the organization in significant numbers.
- ☐ Women are a significant portion of the membership, in line with their numbers within the constituency base this organization targets for membership.
- ☐ Leaders recognize women's needs may be different and when making decisions or setting goals, think of the impact of activities on women.

3. Support of senior leaders

- ☐ Senior leaders have a good understanding and commitment to gender equality and are willing to advance this among the staff and members of the organization.
- ☐ Senior leaders have a good understanding and commitment to gender equality and are willing to advance this in public in their interactions with government, other unions, and NGOs.

4. Organizational Structure

- ☐ There are clear lines of authority and responsibility for monitoring gender equality and gender equality programs within this organization.
- ☐ There is a particular unit or division of our organization charged with advancing gender equality.
- ☐ There is a particular unit or division of our organization charged with promoting women members' concerns and programming for women.



- ☐ Both male and female shop floor or local leaders have a voice and mechanism for articulating their priorities to the leadership level.

5. Practices and Programs

- ☐ There are regular channels for feedback on the impact of activities on women/from women.
- ☐ The organization is gender-inclusive in its communications. For example: There are images of women in publications, publications include stories by and about women members and leaders, and women and men are selected as official spokespeople at public events.
- ☐ The organization keeps track of the numbers of men and the numbers of women who:
  - o attend trainings
  - o benefit from certain key programs
  - o get to travel to meetings to represent the union/federation
  - o are members
  - o are leaders
- ☐ There is strong, ongoing programming related to the specific needs of men.
- ☐ There is strong, ongoing programming related to the specific needs of women.
- ☐ Sexual harassment is recognized as a problem by leaders/staff/members and there are educational programs in place on this topic.
- ☐ Our union/federation works with other NGOs and/or government bodies on gender issues.

6. Finances

- ☐ There are sufficient, and specific budget allocations for gender equality projects and/or to implement gender mainstreaming throughout the organization.
- ☐ The Women's Department or Gender Unit (the body responsible for advancing gender concerns) has control over their own funding and/or have some independent sources of financing.

Source:

Adapted from "Empowering Union Women in Transition Countries: Training Package for Trade Union Educator", by Agnieszka Ghinararu and Jasna Petrovic, May 2001, ICFTU Women's Network for Central and Eastern Europe, and the DAC Source Book on Concepts and Approaches Linked to Gender Equality, OECD, 1998.

TIP SHEET 8

How to Improve Partners' Institutional Gender Capacities

In considering how to assist partners with strengthening their institutional capacity to promote gender equality, it is important to review both gender-specific structures as well as their attempts to mainstream gender throughout the organization. Unions today need to have delegated specific responsibility and authority to advance gender work as well as have broadly integrated efforts.

What are the goals of institutional strengthening and capacity development?

- Promote and support organizational change that contributes to gender equality.
- Promote positive images of women, their needs, interests and views.
- Encourage women's participation throughout the organization.
- Increase women's representation at decision-making levels.
- Develop capacity to undertake gender analysis at the policy, program, and institutional levels, and to design and carry out programming that supports gender equality.
- Develop capacity to collect and utilize sex-disaggregated data.

What kinds of actions are recommended to achieve these goals?

1. **Adopt gender equality policies, plans, and targets.**
   - A gender policy statement or resolution on gender equality.
   - An equality plan.
   - An affirmative action program.
   - Sexual harassment policy (and training).
   - Amendments to the union constitution or statutes to make structures more conducive to gender equality and more "women-friendly".
   - Specific goals or targets for women's representation at different levels of the union structure.
   - Reserved seats, a quota system or numerical targets for women on executive bodies.
   - Procedures that ensure that women have places at union congresses.
   - New ways of conducting union business such as the process in which nominations are made for posts.

2. **Ensure effective, functioning gender structures.**
   - Establish a gender equality or women's unit.
   - Ensure that the gender equality or women's unit has adequate financial and human resources. This includes providing them with their own budget and staff.
   - Ensure that the gender equality or women's unit has a clear mandate.
   - Give mandatory, rather than advisory or consultative, status to the gender equality or women's unit so they have explicit responsibility and authority to carry out their work. Assign them power to take initiatives.
   - Do not assign sole responsibility for gender equality or women's issues to the gender/women's structure; such responsibility should be mainstreamed into all segments of the union, and all activities. Ensure that they are integrated into the mainstream work of the union, otherwise there is a high risk of marginalization of the women's or equality structure.

- Enable the women's or gender unit to have direct input to decision-making bodies – either by reporting directly to the executive and/or being represented on it.
- Do not assign, as a matter of course, posts to women that reinforce stereotypes such as appointing women only as education officers or equality officers. Women should be present everywhere -- including economics, research, organizing, and negotiating units.
- Ensure that women are adequately represented at all levels and in all union structures.
- Ensure that women are represented and active on negotiating teams.

THE ROLE OF WOMEN'S OR GENDER UNITS WITHIN UNIONS

The main functions of such a unit are to:

- Provide women effective representation within a union.
- Give women space to raise the issues that affect their lives and work.
- Create awareness of the special needs and constraints of women.
- Promote advocacy for women's issues and gender equality concerns.
- Help enhance the visibility of women in unions.
- Provide a training ground for women in practical organization and leadership.
- Spearhead efforts to achieve gender parity in all union activities and programs.
- Assume specific responsibility for mobilizing and organizing women workers.
- Organize women's conferences regularly or on specific topics.
- Implement equality policies and programs; and
- Monitor progress in implementation of gender and equality policies and programs.

"When establishing a women's [or gender] committee, it is important to set down in writing the aims and planned activities...together with mechanisms for monitoring progress and how the union will fund the work of the committee. These guidelines can also include measures to integrate the committee, its work and its members into all areas of union work."

3. Improve research, education and training efforts.

- Collect and periodically review statistics on union membership and leadership disaggregated by sex.
- Raise awareness of gender equality and gender issues among both female and male membership.
- Provide education and training for women, in particular to build their confidence and leadership capabilities.
- Address the specific needs and constraints of women, so as to enable them to participate more actively in the union at all levels.

Adapted from: The ILO's "A Resource Kit for Trade Unions" pp. 15-2 and CIDA's Policy on Gender Equality.

TIP SHEET 9

Gender Issues in Preparing to Negotiate a Collective Bargaining Agreement

Collective bargaining can take place at different levels, from the individual workplace to the company, sectoral or industry, national or international level. Unions should not forget that agreements at company, national or international levels that cover gender issues can have considerable impact in terms of establishing minimum standards. Unions negotiating at the individual workplace or local level should then seek to improve on these minimum standards.

Modified from: The International Labor Organization's "Promoting Gender Equality: A Resource Kit for Trade Unions, Booklet 2: Promoting Gender Equality through Collective Bargaining." Gender Promotion Programs, International Labour Office, Switzerland, 2002.

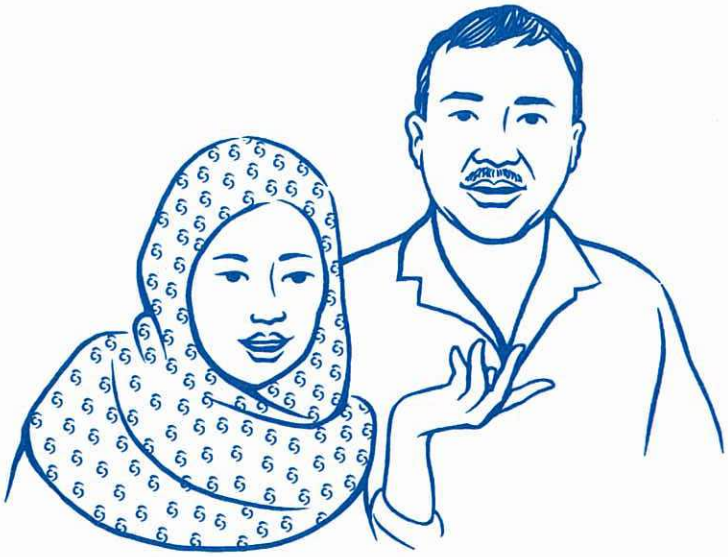
Preparing for Negotiation	Checklists/ Information
1. Ensure the active participation of women, seek their views and make sure their voices are heard	☐ Recruit women members and promote their active participation in all union structures and activities; ☐ Ensure that all workers, especially women workers, understand and are able to make their concerns known to union representatives; ☐ Educate members so that they are able to recognize different forms of discrimination that may be occurring in the workplace; ☐ Widely publicize upcoming negotiations, for example, through sending out circulars to all workers, and provide ample time for workers to submit their views and demands; ☐ Conduct research: Fund the women's unit or equality unit to enable it to research women's concerns, such as tracking promotions by sex, cataloguing sexual discrimination cases, etc.; ☐ Send out simple questionnaires to all workers, allow them to fill out the questionnaire in the language of their choice; ☐ Obtain information on what is happening at the various levels of social dialogue; ☐ Examine what happened in earlier negotiations; ☐ Hold consultation on issues for collective bargaining and, if draft policy available, circulate among all workers for comments and suggestions; ☐ Provide specific opportunities for women workers to make their voices heard: • The gender equality or women's committee, department or unit should discuss with the executive committee the formulation of demands; • The gender equality or women's committee, department or unit should be able to formally submit demands for negotiations; • The union should call special meetings of women representatives from all departments or units; ☐ Devise innovative ways of obtaining the views of those who are absent or silent at meetings, for example: • Get women shop stewards and those close to the women workers to explain to the them collective bargaining process and to determine their views; • Hold special women-only meetings, forums, study groups to give women who are less self-confident opportunities to express their views.

Preparing for Negotiation	Checklists/ Information
2. Promote awareness and appreciation of gender issues	☐ Ensure that union education and training materials incorporate gender issues; ☐ Conduct special campaigns and motivational efforts prior to negotiations, so as to ensure that the membership buys into the gender equality bargaining proposals; ☐ Send out clear messages that both men and women workers have a stake in bettering the lot of women workers; ☐ Help promote gender awareness of employers.
3. Select a negotiating team	☐ Adopt a policy of including women on the negotiation team, so that they can play a key role in formulating demands and examining proposed clauses of the collective agreement for discrimination. Remember, women are used to negotiating and balancing the tight demands of family and work; many people with disabilities, minorities, gays and lesbians are used to working as activists, fighting for their rights and could make good negotiators, used to not taking 'no' for an answer; ☐ Do not only include women on the negotiation team when there are issues deemed to concern women; ☐ Educate and train women members effectively to participate in negotiations and raise gender issues; ☐ Ensure that male members of the negotiating team are also sensitive to gender equality concerns: Remember, it could be highly effective to have a male negotiator present the case for a gender equality or women's issue.
4. Develop the gender equality bargaining agenda	☐ Develop an agenda which best represents bargaining goals and has the best chances of success; ☐ Ensure that gender equality proposals do not become consumed by important, but more general demands as the bargaining process begins; ☐ Use the same arguments with the negotiating team members to get gender equality issues on the agenda as one would with the employer; ☐ In prioritizing gender equality and women's demands on the bargaining agenda remember that: • Company policies that support women often help men too; • Facilities that appear to most help women, benefit both mothers and fathers, children, families, and communities; • Proposals that benefit women have ripple effects that extend to families and communities; • Many proposals that support the entire union membership can have direct positive benefits for women. Better pay, increased safety measures, better lighting, etc. are measures that benefit both women and men. ☐ Circulate draft agreement to all members for approval and support.

Preparing for Negotiation	Checklists/ Information
5. To be well prepared for negotiations, unions should:	☐ Do their "homework", in particular gather all the facts and statistics on the relative position of women and men in the workplace. For example, if unions are to negotiate for equal pay, then they must have all the figures on the number of workers in different job categories and the pay differential between women and men. They should also collect information from other unions, workplaces, etc. for comparisons to substantiate their claims; ☐ Ensure that the overall bargaining strategy includes alliance building with equality seeking groups; ☐ Make use of national and international information networks to gather and exchange information to prepare negotiation positions. Make use of information communications technology, including the growing numbers of Internet Websites; ☐ Be well versed with the existing gender equality provisions and women workers' rights under current government legislation, company policies and regulations, existing contracts, work rules, collective agreements, etc.; ☐ Determine how collective bargaining can be used to ensure that existing rights are extended or secured. With reference to a number of areas of gender equality, a country's legislation may already provide particular rights, but these may not be applied or enforced. Unions should therefore consider how they could repeat the terms of the legislation in the collective agreements so as to help ensure more effective and accessible enforcement; ☐ Have arguments to show employers and union members that promoting gender equality is not only the right thing, but the smart thing to do. The benefits of gender equality provisions in the collective agreement should be clearly explained, not merely in monetary terms, but also with regard to such organizational factors as: • A progressive and positive image for the company; • More efficient use of human resources; • Increased productivity; • Higher staff morale and loyalty to the company; • Lower staff turnover; • Less absenteeism, etc. • Identify and prioritize the demands to be submitted for negotiation. This may require an assessment of the relative costs and benefits of particular demands or collective agreement clauses. Unions may find this a useful exercise since it is more likely that an employer can be convinced to accept a proposal if it can be shown that a certain benefit is relatively cheap compared to the large tangible organization al benefits that it may bring, such as increased productivity.

Preparing for Negotiation	Checklists/ Information
6. At the negotiation table	☐ Promote the active participation of women on the negotiation teams; ☐ Establish the legitimacy of the female negotiators and strengthen their voice at the bargaining table by ensuring that: • They have been properly trained not only in negotiation techniques and procedures but also in gender equality issues; • They have been able through surveys, meetings, dialogue sessions, etc. to gather evidence of the concerns of the members and their support for gender issues; • They have access to solidarity networks for exchanging information and data and gathering support; • The support of the male leadership is evident to the female negotiators, the management and the rank and file membership; ☐ Ensure that each negotiator, male and female, has equal status as a qualified representative at the bargaining table; ☐ Ensure that female negotiators are given ample opportunities to present their demands and make their vies heard at the bargaining table; ☐ Ensure that any gender equality demand presented is fully supported by all members, male and female, of the negotiating team. Remember, divide and conquer is one of the oldest battle tactics. Do not fall for it; ☐ Examine collective agreements to ensure that there is not discrimination in the proposed clauses; ☐ Use gender-aware language in the collective agreement; ☐ Ensure that the negotiating team is equipped with the facts and arguments to convince the management of the benefits of gender equality in the collective agreement; ☐ Specify in the collective agreement the resources and mechanisms for effective implementation and monitoring of the gender equality provisions; ☐ Do not succumb to the temptation to present gender equality concerns as subordinate to other employment issues. Gender equality bargaining can benefit both women and men alike at the workplace.
7. Follow-up after the negotiations	☐ Make sure the negotiated policies, rights and benefits are communicated to all workers on a regular basis (including those with non-permanent or atypical status). Such information dissemination should be through various methods: posted at the workplace, made available in lay language through the newsletters, seminars, lunchtime meetings, role pay, etc.; ☐ Establish methods for regularly monitoring the proper implementation and the overall effects of the collectively bargained policies, rights and benefits. Ad-hoc monitoring/research committees, which include female union members could effectively work toward this end; ☐ Establish grievance procedures to deal with any abrogation of the workplace contract, discrimination or sexual harassment;

Preparing for Negotiation	Checklists/ Information
7. cont.	☐ Inform all workers of the proper methods of handling grievances and assure them that their complaints will be treated confidentially and fairly; ☐ Increase the presence of women in the collective bargaining process through promoting their participation on monitoring committees and grievance boards. In addition, the presence of women may make it easier to bring claims related to discrimination or sexual harassment to the attention of the union and the company; ☐ Regularly gather statistics. Keep a close eye on the number of women and men who are hired, promoted and dismissed, as well as the numbers in all job categories, salary levels and human resource development programs. Keep a special eye on equal pay provisions by collecting wage data; ☐ Always think ahead. Evaluate what workplace provisions need to be improved or reviewed to improve their effectiveness. Such issues could be introduced during the next round of collective bargaining; ☐ Publicize the work done by the union on behalf of women – as an organizing strategy. It is important for unions to publicize their new bargaining objectives and the strategies they have used or intend to use to achieve them.



TIP SHEET 10

Gender Equality Bargaining Checklist

Gender Equality Bargaining can be a powerful mechanism through which unions can either enforce existing rights under legislation or previous collective agreements, or extend workplace rights on issues traditionally ignored. Unions may strategically choose which issues they will present for negotiations. Their choice will depend on factors which may influence their bargaining leverage, such as the state of the local or national economy, the current state of the labor market, the economic situation of the company, or public image. The chart below outlines some issues a union may wish to raise at the bargaining table from a gender-inclusive perspective.

Modified from: The International Labour Office's "Promoting Gender Equality: A Resource for Trade Unions, Booklet 3: The Issues and Guidelines for Gender Equality Bargaining." Gender Promotion Programme, International Labour Office, Switzerland. 2002.

Key Gender Equality Issues	Bargaining Checklists/Information
Ending Discrimination and Promoting Equal Opportunities	
Sex Discrimination Sex discrimination can be overt or direct discrimination or more subtle, indirect discrimination. Provisions can be negotiated in collective agreements to protect women against direct and indirect discrimination, such as informal systems of recruitment that often prejudice women. These provisions could include:	☐ General equal opportunities clause, expressing the commitment of the union and the employer to promoting equal opportunities for women and men; ☐ Opportunities for women, including those with non-permanent contracts, to apply for all positions and to benefit from training programs; ☐ Non-discrimination against workers with family responsibilities, in particular with respect to promotion and advancement; ☐ Protections that ensure job application forms include only those questions relevant to the job; ☐ Questions such as marital status and number of children can be asked if linked to particular benefits; ☐ Neutral job descriptions – if they are gender-specific, stereotypes are enforced. Women may feel excluded; ☐ Gender-inclusive language in the collective agreement – if possible avoid saying 'the worker, he shall...'. Gender-inclusive language shows a commitment to equality; ☐ Equality officer or women's committee to implement objectives and review progress; ☐ Training in equal opportunities issues for all those involved in recruitment and negotiations; ☐ Reversal of burden of proof – once a worker can show she/he was disadvantaged, it is for the employer to prove that it was not on the basis of sex.

Ending Discrimination and Promoting Equal Opportunities

Equal Opportunities Agreement To protect workers from both overt and more subtle forms of discrimination and victimization, unions can negotiate an equal opportunities policy and agreement. Keep the following questions in mind when negotiating an equal opportunities agreement.	☐ Do you have an equal opportunities agreement? ☐ Do all members and prospective members know about it? ☐ Is it published or advertised? ☐ Is it monitored? ☐ Is it reviewed by management and union representatives? If so, how and how often? ☐ Does it deal with job segregation, or lack of promotion for women? ☐ Does it commit management to take positive action where the policy is not working? If so, what positive action has been taken and is it showing results? ☐ Are management and employees trained on the policy? Is the training regularly updated? ☐ Is there a joint union/employer equal opportunities committee? Does it meet on a regular basis? ☐ Is there an agreed procedure for investigating complaints about recruitment, appointments and promotions? ☐ Can staff get paid time off to attend union training on equal opportunities? ☐ Does the agreement demand that all collective bargaining agreements are reviewed to eliminate any sex bias?
Training and Promotion Women are often denied access to training and promotion which limits their ability to meet the challenges of changing technologies and to advance in their jobs. Unions can negotiate to:	☐ Press for greater training and richer task-assignment opportunities for women, including those in non-permanent positions; ☐ Ensure that women workers have access to information on training opportunities; ☐ Make company training programs more flexible and responsive, so that women workers can be more adaptable and multi-skilled, rather than having traditional stereotyped vocational and sex-segregated skills. It is important that there are provisions to ensure that women are able to avail themselves of training opportunities, eg. Through flexible training schedules and childcare facilities; ☐ Where necessary, provide reserved places for women in training and retraining opportunities, and set targets or quotas, with clear time tables, for recruitment or promotion; ☐ Ensure that training programs have the following objectives: • Meeting the skills needs of new and growing occupations [Remember: occupations in information and communications technology]; • Enhancing the skills of workers to cope with changes in equipment, job specification and work organization; • Multi – skilling to improve flexibility; • Retraining for workers whose jobs have been abolished or redesigned; • Ensure that skill upgrading and job-enrichment are duly recognized in individual evaluation procedures and calculation of pay and for career progression; • Make all selection and promotion systems transparent and establish union participation in procedures; ☐ Ensure that women receive credit for work-related experience and that they do not lose their seniority due to career breaks.

Key Gender Equality Issues	Bargaining Checklists/Information
Wages and Benefits	
Equal Pay Worldwide, women earn 20-30 percent less than men. To bargain for equal pay for work of equal value, unions could:	☐ As a first step, gather information to establish a general picture of gender and pay. For example, the Commission of the European Communities has issued a Code of Practice on the Implementation of Equal Pay for Work of Equal Value. The code sets out a list of key indicators of potential sex bias. Unions could use this code to review their workplace to determine if: • Women have lower average earnings than men with the same job title; • Women have lower average earnings than men in the same grade; • Women in female-dominated jobs are paid less than the lowest male-dominated job; • Jobs predominantly occupied by women are graded or evaluated lower than jobs predominantly occupied by men at similar levels of effort, skill or responsibility; • Women are paid less than men with equivalent entry qualifications and length of service; • Where separate bargaining arrangements prevail within one organization, those dominated by men receive higher pay than other bargaining groups dominated by females; • The majority of men and women are segregated by different grading, classification and evaluation systems; • Part-time or temporary workers, who are mainly women, have lower average hourly earnings than full-time or permanent employees in the same job or grade; • Part-time or temporary workers, who are mostly women, have access to fewer pay and other contractual benefits; • Different bonus arrangements, piece rate and other "payment by result" systems, apply in different areas of production, disproportionately affecting one gender; • Holiday entitlements vary between jobs in the same grade disproportionately affecting one gender. ☐ Ensure that job evaluation and classification systems are gender neutral.
Job Evaluation Job evaluation is a comparison of the relative value of different jobs in terms of the level of demand the work makes on the average worker. The abilities of the individual are not measured. Unions should bargain for gender neutral job evaluation criteria	☐ Objective job evaluation criteria: • Knowledge and Skills • Physical Skills • Mental Skills • Communication Skills • Human Relation Skills ☐ Effort: • Physical Demands • Mental Demands • Emotional Demands ☐ Responsibility (for): • Information and material sources • Direct supervision over other employees • Direct responsibility for the well-being including health and safety of other people • Planning, organization and development • Working Conditions • Hazards – exposure, risk of injury, diseases • Environment exposure to disagreeable working environment, etc

Key Gender Equality Issues	Bargaining Checklists/Information
Wages and Benefits	
Pensions Pensions are deferred pay – pay a worker gets after she/he retires. It is another aspect of equal pay. In negotiating a pension scheme, unions should:	☐ Start off by ensuring that women receive equal pay and equal opportunities; ☐ Ensure that employer pension schemes are available to all employees, including part-time workers; ☐ Ensure that women can be given pension credits to allow for the fact that they are likely to have periods outside paid employment; ☐ Reduce the theoretical working life of women to allow for likely interruptions. Thus fewer but greater pension payments can be paid for women workers to ensure that women receive the same pension on retirement as their male colleagues; ☐ Link pension contributions to maternity leave to ensure continuity of provision (remember, however, that this is harder with longer periods of absence); ☐ Allow for voluntary contributions enabling workers to make up any shortfall in their pension. (But again, this may not be an ideal solution as women are literally forced to pay for any interruption in their employment history).
Family Friendly Policies	
Childcare Childcare is not limited to pre-school children. Unions can negotiate to solve various childcare problems:	☐ Daycare ☐ Creche ☐ After school care ☐ Childcare allowance ☐ Holiday pay scheme ☐ Childcare information services ☐ Resource and referrals ☐ Childcare tax programs and funds ☐ Providing childcare ☐ Backup and sick childcare ☐ Extended hours/before and after school care
Maternity Protection and Benefits Maternity protection and benefits should be viewed as a package including non-discrimination, job security, maternity leave, cash benefits, health protection measures and nursing breaks. Unions can bargain to ensure:	☐ Prohibition of pregnancy testing for recruitment or whole on the job; ☐ No victimization or loss of job due to pregnancy; ☐ All women employees receive sufficient maternity leave to ensure the recovery of the mother and development of the child; ☐ Any illness related to maternity will warrant extra leave as well as in the case of multiple births such as twins, or other exceptional deliveries such as caesarean delivery; ☐ Maternity leave does not result in decreased job security; ☐ The right to return to the same or similar job after maternity leave, parental or extended leave; ☐ Leave for miscarriage or stillbirth

Family Friendly Policies	
Maternity cont.	Unions can also bargain for the following to allow pregnant and nursing women to continue working: ☐ The right to lighter and non-hazardous work, especially where chemicals are used or heavy weight lifted by workers manually ☐ Flexible working hours so that they can avoid traveling during peak hours, particularly when public transportation is inadequate; ☐ Shorter working hours; ☐ Additional Rest Breaks ☐ The ability to move from night work to day work; ☐ The right to nursing breaks without reduction in pay.
Family Leave Family leave allows employees to take time off work to care for their families or recuperate from serious illness with a guaranteed job when they return. Unions can bargain for:	☐ Paternity Leave: A male worker whose spouse/partner has a baby requires time off from work to attend to the pressing family needs surrounding a birth. Paternity leave can also be negotiated in the case of adoption or stillbirth. ☐ Parental Leave (paid and unpaid): taken by mothers and fathers to care for newborn, newly adopted or foster care children. ☐ Family Leave: an employee is given the right to take off from work to care for a new child or family member who is seriously ill or for other family related reasons. ☐ Part-time Return to Work: new parents may wish to work part-time after a child is born/adopted. Part-time work can be negotiated for a defined period of time. ☐ Short Term Leave: allows an employee to take short periods of time off to care for their families or for personal reasons. ☐ Donated Leave and Leave Banks: employees are allowed to donate their leave directly to another employee who has used up all of their own leave due to a personal or family crisis. ☐ Expanded Definition of "Family": broadens the definition of family in leave clauses to include many different kinds of relationships.
Hours of Work	
Flexible Working Time Flexible working time arrangements allow employees to start and end work during some range of hours. The union can negotiate the terms and methods of monitoring flexi-time.	☐ Bargain for flexible working hours, including the terms and methods of monitoring flexi-time; ☐ Ensure that management arranges the workload so that work is evenly distributed throughout the "flexible" workday; ☐ Negotiate compressed work weeks where employees work extra time over a certain number of days and have a day off; ☐ Negotiate salary deferral and personal leave plan whereby workers bank a proportion of their salary in preparation for a paid leave; ☐ Negotiate sabbaticals for those who require regular updating in their fields. While sabbaticals are not designed to address family responsibilities, they could be scheduled to coincide with a family event; ☐ Conduct educational sessions with members about work and family issues that address co-worker resentments about those working non-standard days; ☐ Give workers with heavy family responsibilities preference in the selection of hours and holiday schedules.

Key Gender Equality Issues	Bargaining Checklists/Information
Hours of Work	
Part-Time Work with Benefits Part-time workers, the majority of them women, tend to be exempt from benefits offered to full-time employees. Bargaining can be used to ensure that:	☐ Various types of part-time work arrangements (not just 50 percent of full-time) are possibilities; ☐ There is equal treatment for part-time and full-time workers, including the same basic hourly and overtime pay rates; ☐ Part-time employees receive the same benefits and have the same conditions as full-time employees; ☐ Where benefits, such as medical care and access to welfare facilities, are not appropriate for pro-rating, part-time workers are entitled to full benefits (Transport benefits and other cash benefits which are unsuitable for systematic pro-rating may be more appropriately awarded to all workers on a needs basis); ☐ Part-time workers have rights with respect to lay-offs, including severance pay; ☐ Avoid thresholds built into eligibility requirements and qualifying conditions, such as minimum number of hours worked or earnings.
Other Types of Alternative Work Schedules To facilitate a balance between family and working lives, unions can bargain for a broad range of alternative work schedules:	☐ Telecommuting: working from a site other than the central worksite, usually home. Telecommuting offers workers a great deal of flexibility, however risks include the telecommuting worker becoming isolated and the possibility of "sweatshop labor" because homework is difficult to monitor. ☐ Job Sharing: two part-time workers share one full-time job. The salary and benefits are often pro-rated according to hours worked. Full benefits for both employees may also be negotiated. ☐ Compressed Work Week: allows a full-time worker to work all their hours in fewer than five days per week. ☐ Shift Swaps: provision in a collective bargaining agreement that allows workers to exchange shifts or workdays on a voluntary basis to accommodate family needs. ☐ Voluntary Reduced Time: allows an employee to reduce the number of hours she/he works in a week in order to have extra time to take care of personal or family needs.
Health & Safety	
Health and Safety of Workers Unions need to negotiate health and safety processes and procedures which take women into account. Unions should negotiate that:	☐ Access to information regarding what chemicals or dangerous substances workers are using, and proper instructions, information, labeling and disposal procedures are provided; ☐ Adequate protective equipment and clothing and training on safety procedures are provided; ☐ Workers are protected from exposure to extreme temperatures; ☐ Noise does not exceed legally admissible levels; ☐ Proper ergonomic principles are adhered to regarding workstation design and working positions, including provisions for work performed seated and/or standing; ☐ Better designed workstations and tools and improved work organization to reduce the risk of repetitive strain injuries; ☐ Annual employer-paid eye examinations, especially for those working with computers;

Key Gender Equality Issues	Bargaining Checklists/Information
Health & Safety	
cont.	• Separate toilet and rest room facilities for women workers; • Special health and safety provisions to protect pregnant women and fetuses, including: • Not assigning pregnant women to heavy manual tasks, night work or arduous tasks; • Ensuring adequate access to space for movement around machines and equipment; • Providing sitting facilities; • Granting sufficient rest periods; • Possibility for pregnant or nursing women to transfer to other work where necessary.
HIV/AIDS Unions can play an active role in providing appropriate HIV/AIDS health education to workers and their families. A written workplace policy on HIV/AIDS should be developed to include the following:	☐ Definition and facts: • Definition of HIV infection and AIDS; • Explanation of how HIV is transmitted and stages of the illness. ☐ Human Rights: • Respect for the human rights and dignity of persons infected or affected by HIV/AIDS and no discrimination against workers on the basis of real or perceived HIV status; • Employees with HIV/AIDS have the right to fair and compassionate treatment; • HIV/AIDS is not a cause for termination of employees; • As with many other conditions or illnesses, employees with HIV/AIDS are entitled to work as long as their condition permits and must be given reasonable accommodation regarding their schedule, duties or conditions of work; • Employees with HIV/AIDS have the right to equal benefit coverage. ☐ Safety: • Employers have a legal obligation to provide a safe and healthy working environment; • Employers shall institute universal safety procedures where exposure to blood and body fluids is likely to occur. ☐ Confidentiality: • There is no justification for asking job applicants or workers to disclose HIV-related personal information; Nor should co-workers be obligated to reveal such personal information about fellow workers; • Infected employees have the right to confidentiality concerning their medical status. ☐ Accommodation: • Employers and unions have an obligation to make reasonable accommodations to schedules, duties and conditions or work for infected employees. ☐ Support: • Solidarity, care and support should guide the response to HIV/AIDS in the workplace; • All workers, including workers with HIV, are entitled to affordable health services; • Employees with HIV infection shall be given information on where they can have access to counseling, support and treatment. ☐ Non-Discrimination: • Harassment and discriminatory or stigmatizing acts against an employee with HIV infection shall not be tolerated; • HIV/AIDS screening should not be required of job applicants or employees;

Key Gender Equality Issues	Bargaining Checklists/Information
Health & Safety	
cont.	• There should be no discrimination against workers with HIV and their dependents in access to and receipt of benefits from statutory social security programs and occupational schemes. ☐ Education: • Ongoing education shall be provided to dispel myths about HIV/AIDS, explain the workplace care and compensation policy and human rights legislation and promote safe work practices. ☐ Review: • The employer shall regularly review and update the policy to reflect current knowledge and circumstances in the workplace.
Violence in the Workplace Violence in the workplace may occur between co-workers or workers may be subjected to violence from customers or clients. Unions and employers should together develop and put into practice policies and procedures for reporting, investigating and dealing with violence.	☐ Definition of Violence: any incident in which an employee is abused, threatened or assaulted during the course of his/her employment. This includes the application of force, threats with or without weapons, severe verbal abuse and persistent sexual and racial harassment. ☐ Violence Policies and Procedures: policy will address the prevention of violence, the management of violent situations and the provision of legal counsel and support to employees who have faced violence. The policies and procedures shall be part of the employer's health and safety policy. ☐ Measures and Procedures to Prevent Violence to Employees: in all cases where employees or the union identify a risk of violence to staff, the employer shall establish and maintain measures and procedures to reduce the likelihood of incidents to the lowest possible level. In developing measures and procedures to prevent violence, priority will be given to options such as job redesign, adequate staffing levels and improving the working environment, before considering the need for personal protection or alarms. ☐ Function of Workplace Union-Employer Health and Safety Committee: concern itself with all matters relating to violence to staff, including but not limited to: (i) developing violence policies; (ii) developing measures and procedures to prevent violence to staff; (iii) receiving and reviewing reports of violent incidents; and (iv) developing and implementing violence training programs. ☐ Staffing Levels to Deal with Potential Violence: where there is a risk of violence, and adequate level of trained employees must be present.

TIP SHEET 11

Questions to Evaluate Trainings

Training is a major component of many Solidarity Center programs. Consider using these questions as part of written and oral evaluations – immediately after the training and in follow-up evaluations. Note any differences between what men and women say in response to the questions, and think about how to take those differences into account in the design of your next training or workshop.

1. For qualitative indicators on the quality of the training, ask open-ended questions about male and female participants' and leaders' feelings, perceptions, evaluation of skills honed, information gained, etc. Was there a difference between what men and women said? If so, what was the source of those differences?

2. How many women attended the training/workshop? What percentage were they of the total participants?

3. How many women leaders, resource people or facilitators were used in the training? What percentage the training leadership and planning was female?

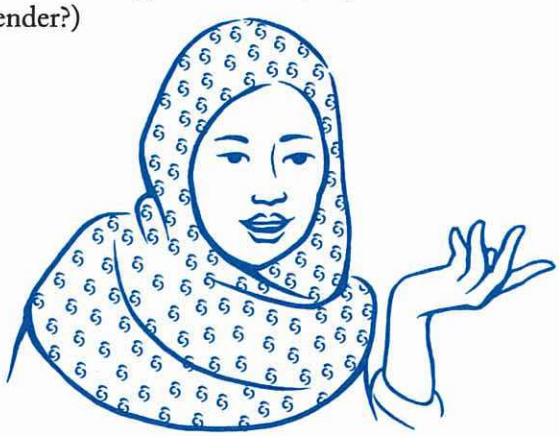
4. Why did participants and/or leaders feel this training was successful, if it was?

5. How did leaders know that participants felt more confident after the training? (Example of an open-ended question to probe evaluations by leaders.)

6. How did participants use the knowledge and skills obtained in the training? (Any breakdown by gender?)

7. What was the type and quality of the activities carried out in unions or the community as a result of the training? (Any breakdown by gender?)

8. What was the impact of participants' attempts to use their new knowledge and skills? (Any breakdown by gender?)



TIP SHEET 12

Indicators of Participation and Empowerment

The following guidelines on indicators for empowerment and participation are drawn from the Canadian International Development Agency's 1997 publication *"The Why and How of Gender-Sensitive Indicators: A Project Level Handbook."*

PARTICIPATION INDICATORS

Most participation development projects have involved the formation of groups. For this reason most work on indicators of participation has focused on group formation. The indicators selected below are the ones that have been commonly used and are relatively easy and inexpensive to collect. They can be adapted to measure gender-sensitivity for all types of development projects whether or not the focus of the project specifically promotes participation. Ideally, indicators of participation should be gathered in a participatory fashion, but in practice, as with most other indicators, this is rarely done. Time frames should be made clear for each indicator.

Examples of quantitative indicators of participation

- Levels of input of women/men at different levels (government departments, NGOs, local stakeholders) to identification and planning.
- Numbers of identification and planning meetings held with local stakeholders.
- Attendance by local stakeholders at identification and planning meetings by sex, socio-economic grouping, age and ethnicity.
- Levels of contribution/participation by local stakeholders at identification and planning meetings.
- Levels of participation by local stakeholders to base-line study.
- Audit of resources or funds held regularly and openly.
- Existence of a set of rules that were developed in a participatory fashion, and in which all members of the community were partly/fully involved.
- Reduced reliance on external funds.
- Frequency of attendance by women and men, by socio-economic grouping.
- Number of women and men in key decision-making positions, by socio-economic grouping.
- Rotation of people in leadership positions.
- Levels of women's and men's inputs, by socio-economic grouping, in terms of labor, tools, etc.
- Socio-economic, age and ethnic make-up of women and men attending meetings.
- Levels of participation by different stakeholders in evaluation.
- Degree to which lessons of evaluation are acted upon by different stakeholders.

Examples of qualitative indicators of participation and qualitative analysis

Indicators for qualitative evaluations of participation have to be framed mainly in terms of interactions within relevant groups and organizations. Typically, they relate to three main areas: organizational growth, group behavior, and group self-reliance.

Qualitative indicators and analysis of participation could focus on:

- Stakeholder perceptions of levels of participation of different groups through stages of the project cycles. Stakeholders could be asked to pin-point levels of participation on a scale of 1-5.
- The degree of solidarity and mutual support among the group and between women and men, to be measured through responses of stakeholders and qualitative analysis of changes in group behavior.
- The ability of the group to prevent and resolve conflicts, to be measured through stakeholder responses and qualitative analysis.

EMPOWERMENT INDICATORS

Empowerment is difficult to measure, and there is no agreed-upon method. Empowerment needs to be clearly defined if indicators are to be developed. Most definitions stress two main areas of empowerment:

1. A personal change in consciousness involving a movement towards control, self-confidence and the right to make decisions and determine choice.

2. Organization aimed at social and political change.

The indicators chosen should fit these areas, but they will differ depending on whether the area of empowerment covered is personal growth, or socio-economic and political change, or both. They will also differ depending on the objective of empowerment being measured (e.g. greater self-respect, or access to the benefits of economic growth, or the creation of a just social and economic order). Because of these differences, when a project objective is the "empowerment of women" or "people's empowerment" it is important to specify:

- the type of empowerment
- rough time-scales within which project objectives will be accomplished
- the numbers of people to be affected, and
- the degree to which they will be affected.

In short, choosing indicators of empowerment will depend on the way empowerment is defined. While difficulties exist, there are a number of usable indicators to measure empowerment. These are listed below. Many empowerment indicators are process indicators, because becoming empowered often involves a long process of change.

Examples of quantitative indicators of empowerment

Legal Empowerment (changes should be noted over time)

- Enforcement of legislation related to the protection of human rights.
- Number of cases related to women's rights heard in local courts, and their results.
- Number of cases related to the legal rights of divorced and widowed women heard in local courts, and the results.
- The effect of the enforcement of legislation in terms of treatment of offenders.
- Increase/decrease in violence against women.
- Rate at which the number of local justices/prosecutors/lawyers who are women/men is increasing/decreasing.

Political Empowerment (changes should be noted over time)

- % of seats held by women in local councils/decision-making bodies.
- % of women in decision-making positions in local government.
- % of women in the local civil service.
- % of women/men registered as voters/% of eligible women/men who vote.
- % of women in senior/junior decision making positions within unions.
- % of union members who are women/men.
- Number of women who participate in public protests and political campaigning, as compared to the number of men.

Economic Empowerment (changes should be noted over time)

- Changes in employment/unemployment rates of women and men.

- Changes in the time-use in selected activities, particularly greater sharing by household members of unpaid housework and child-care.
  - Salary/wage differentials between women and men.
  - Average household expenditure of female/male headed households on education/health.
  - Ability to make small or large purchases independently.
  - % of available credit, financial and technical support services going to women/men from government/non-government sources.

Social Empowerment (changes that should be noted over time)

- Number of women in local institutions (e.g. women's associations, consciousness raising or income generating groups, local churches, ethnic and kinship associations, worker associations) relative to project area population, and numbers of women in positions of power in local institutions.
- Extent of training or networking among local women, as compared to men.
- Control of women over fertility decisions (e.g. number of children).
- Mobility of women within and outside their residential locality, as compared to men.

Examples of Qualitative Empowerment

Qualitative indicators of empowerment are particularly hard to agree upon, in part at least because empowerment itself is a concept that has been defined in different ways. At the present stage of debate perceptions of empowerment are more likely to be elicited by indicator questions of the following types rather than by the indicators implicit in the questions. These questions have to be reinforced by others that relate to qualitative analysis.

INDICATOR QUESTIONS TO ASSESS EMPOWERMENT

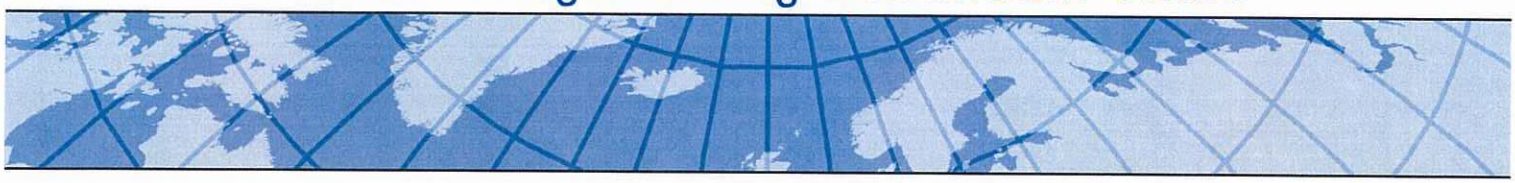
- To what degree are women aware of local politics, and their legal rights? Are women more or less aware than men? Does this differ by socio-economic grouping, age or ethnicity? Is this changing over time?
- Do women and men perceive that women are becoming more empowered? Why?
- Do women perceive that they now have greater self-respect? Why? How does this relate to men's perceptions?
- Do women/men perceive that they now have greater economic autonomy? Why?
- Are changes taking place in the way in which decisions are made in the household, and what is the perceived impact of this?
- Do women make decisions independently of men in their household? What sort of decisions are made independently?

KEY QUESTIONS FOR QUALITATIVE ANALYSIS

- How have changes in national/local legislation empowered or disempowered women or men (e.g. concerning control over resources such as land)?
- What is the role of local institutions (including women's institutions) in empowering/disempowering women/men?
- Is the part that women, as compared to men, are playing in major decisions in their locality/household increasing or decreasing?
- Is there more acknowledgement of the importance of tasks customarily carried out by women, e.g. child care?
- How are women organizing to increase their empowerment, for example against violence?
- If employment and education for women are increasing, is this leading to greater empowerment?

APPENDIX A

Gender Programming Continuum Chart



During some of the regional workshops, staff asked what a top-flight "gender program" looks like. Does it mean focusing on getting a good percentage of women to participate? Does it mean addressing "women's issues"? Both? Where do men fit in all of this?

There are many ways to improve Solidarity Center programs to promote gender equality. How one goes about it depends on the goals as well as the political and social contexts. It also depends on where your partner organization is situated on what can be thought of as a continuum of gender inclusiveness and awareness.

The following chart tracks different program objectives, assumptions, participants, activities, topics covered, skills developed, and indicators through an illustrative continuum of gender programming. A section is also included with ideas about how to move from one stage to the next. All of the information in the chart is based on the following hypothetical example:

A small food workers' union asks the Solidarity Center to help increase its membership and capacity. The majority of workers in the industry are women, who are concentrated in food processing and packing jobs. About 20% of the workers in the industry are men, working mostly in transport, and in packing jobs at the canning plants. Leadership in the union is about 85% male.

	Base Case Scenario – aka "A good place to start"	**Alternative Scenario 1:** aka "Let's get some women involved"	**Alternative Scenario 2:** Addressing women workers' needs	**Alternative Scenario 3:** Men and women working together to build union capacity and worker strength
ASSUMPTIONS	Planners and trainers have very little awareness of gender equality issues generally, and are blind to how those issues might affect their union.	Planners and trainers have some awareness of gender equality issues. They may recognize that female members have some specific problems and interests, yet be unaware how such issues relate to the goals of the union.	Planners and trainers have a commitment to empowering women in the union and see targeting a special training for them as a way to do this. They recognize that female members have some specific issues that need to be addressed – they believe that women need to stand up and advocate on their own behalf.	Planners and trainers have a commitment to empowering women in the union, in the workplace, and in the larger economy. They understand that achieving women's rights is key to achieving worker rights. They know that men and women sometimes have different interests and priorities, and that these need to be discussed and negotiated in the context of the union.

	Base Case Scenario – aka "A good place to start"	**Alternative Scenario 1:** aka "Let's get some women involved"	**Alternative Scenario 2:** Addressing women workers' needs	**Alternative Scenario 3:** Men and women working together to build union capacity and worker strength
Objectives	Increase the number of workers organized Strengthen union	Increase capacity of organizers to reach out to women workers /Increase # of women workers organized	Increase women's leadership in the union	Build more powerful and representative unions where men and women are strong and working in solidarity with one another
Participants	Current union leaders and organizers	Shop stewards Existing organizers	Women Workers and Shop Stewards	Men and women elected and grassroots leaders and activists
Activities/ approach	Training workshop – mostly lecture format	Training workshop with participation in strategic planning	Participatory workshop that includes analysis and experience of participants	Transformational educational techniques designed to develop critical consciousness and mobilize strategic action
Topics Covered	Organizing 101 Elements of a strong trade union Strategic Planning	Organizing 101 Elements of a strong trade union – how women can help strengthen the union Strategic planning – with focus on how to bring more women into the union	Organizing 101 Leadership skills for women Trade union values Strategic planning for increasing the number and influence of women leaders	Workers Organizing for Social Change How to conduct a gender analysis How to analyze and transform power to support a gender-inclusive workers' agenda Gender-inclusive strategic campaigning and organizing plans

	Base Case Scenario – aka "A good place to start"	**Alternative Scenario 1:** aka "Let's get some women involved"	**Alternative Scenario 2:** Addressing women workers' needs	**Alternative Scenario 3:** Men and women working together to build union capacity and worker strength
Skills Developed	Ability to plan organizer training Ability to articulate key characteristics of strong union – i.e. democratic, representative, etc. Utilize strategic planning framework to develop activities and programs to increase union outreach to potential members	Have an understanding of how to structure organizing meetings to make it easier for women to attend Be able to articulate why it is important for the union to reach out to women workers as key strategy for increasing membership	Leadership skills – how to run a meeting, speak in public, build alliances, etc. Strategic planning for advancing a women's agenda in the trade union Using organizing techniques to help women increase their power as workers	Ability to articulate personal values and how they relate to trade union values, and broader social trends. Ability to listen and understand different points of view Ability to conduct a gender analysis that includes an analysis of power, and use this analysis as the basis of strategic planning and campaigns
Indicators	Increased membership numbers Strategic plan developed for next year	Increased number of women joining the union Workplan that integrates plan for outreach to women	Number of women trained Changes in women's perceptions about their ability to be leaders Increase number of elected women leaders at all levels of the union	Increased solidarity between men and women in the union, as evidenced by their perceptions, backed by specific examples Plans that specifically take into account and build from the different experiences, values, needs and priorities of men and women. CBA that integrates women and men's key concerns and priorities. Development of a plan to support women leaders within the structure of the union

Commentary

Base Case Scenario – aka "A good place to start"	**Alternative Scenario 1:** aka "Let's get some women involved"	**Alternative Scenario 2:** Addressing women workers' needs	**Alternative Scenario 3:** Men and women working together to build union capacity and worker strength
This is often the first step for any union – and can provide the basis for gender inclusive unions over the long run. In unions that are not gender-aware, it is likely that few or no women will attend the training. You may need to set quotas for women's participation as a condition of supporting the training. You may also choose to focus on the male leaders, using techniques and information that will help them come to their own conclusions about the importance of women in their unions. In such a scenario, it may also be appropriate to provide workshops for leaders on the basics of gender equality and why it is important to achieving their goals. It can also be the case that unions run by women with majority women's membership are not very "gender aware". Similar strategies as those noted above can be used in this case as well.	In employing this strategy, you've made some progress in encouraging the union to reach out to women. Still, in order to bring women to this event, you may need to set quotas. Other approaches to getting women to participate could include doing targeted outreach to formal and informal women leaders and/or any women's network in the union. If few or no shop stewards are women, and thus obvious candidates for the training, you might relax the requirements to enable women workers who show leadership potential to attend. At this stage, however, it is still a question of how women workers can bring power to the unions, not vice-versa.	This is an important strategy and one that is often needed. You may be able to "sell" it as a way of ultimately increasing union membership (because the union will be more appealing to female workers if it appears to be doing a better job championing their interests). The trap, of course, in this, is that it ignores men. This "putting the burden on women's shoulders" approach only goes so far in producing change. Depending on the climate within the union, you'll have to decide how to handle the composition of the participant list and how you're going to address the male side of the equation. You may need to employ one or more of the "fix-it" attendance strategies mentioned in scenario 1 and 2 in order to attract enough women to this event. You will also need to revamp the curriculum and possibly re-train or utilize different trainers who are sensitive to gender power dynamics within unions. Even if you do this type of training for both men and women, there are still deeper levels of progress towards gender equality that can be made. In developing the curriculum, you probably touched upon some of women's practical needs, and possibly their strategic interests, but not how they relate to men's practical needs and strategic interests, and how women leaders can help advance both.	This type of educational process will require more than one workshop. The topics it covers and the change it seeks are multilayered and circular. You may have to bring in specialized trainers or add a program component to train in-country trainers in this type of approach in order to institutionalize these skills for long-term sustainability. Because the approach to strengthening the union and organizing workers recognizes the worker as a whole person, it has the potential to build morale and boost loyalty to the union in ways that the old methods do not. You may need to help participants in such an approach stay grounded in the power dynamics of their home, workplace and union, even as they strive to take on challenges to worker rights from outside forces such as their employer and the larger economic policy environment. For example, it may be useful for participants to talk about practical changes that they can make at home and at work that would model and advance gender equality.

APPENDIX B

Additional Gender Programming Resources

1. **Promoting Gender Equality: A Resource Kit for Trade Unions**
International Labour Office, Gender Promotion Programme, *(Geneva, Switzerland 2002)*

The resource kit provides background information, practical guidance and case studies on how to eliminate gender discrimination. The resource kit provides advice for trade unions seeking to partner their efforts with non-governmental organizations, government agencies, employers' associations, academic institutions and the media. The resource kit is comprised of six booklets that cover different areas of trade union activities involved with the promotion of gender equality and protection of vulnerable workers. The kit also includes a report of the ILO-ICFTU on case studies of trade unions, providing empirical evidence for specific strategy's successes.

Booklet One: *Promoting Gender Equality Within Unions*
Booklet Two: *Promoting Gender Equality Through Collective Bargaining*
Booklet Three: *The Issues and Guidelines for Gender Equality Bargaining*
Booklet Four: *Organizing the Unorganized: Informal Economy and other Unprotected Workers*
Booklet Five: *Organizing in Diversity*
Booklet Six: *Alliances and Solidarity to Promote Women Workers' Rights*

Contact Information: *Gender Promotion* **Programme – ILO www.ilo.org**

2. **Gender Equality and Decent Work Good Practices at the Work Place**
International Labour Organization, Bureau for Gender Equality. *(Geneva, Switzerland 2004) 121 pages*

This publication is to be the first portion of an upcoming ILO Toolkit on Gender Mainstreaming in the World of Work. Twenty-five case studies are included, each detailing how a specific organization approached gender equality. Practitioners of gender equality can take the tools detailed in the case studies and apply them to their own work.

3. **Gender At Work: A New Knowledge Network for Gender Equality and Institutional Change**
www.genderatwork.org

Gender at Work is an internet based knowledge and capacity building network focused on gender and institutional change. Gender at Work focuses its work with development and human rights practitioners, researchers and policy makers. The network focuses on developing new theory and practices for organizations to change gender based institutional rules, values, and practices. In addition, the network also aims to change the political, accountability, cultural and knowledge systems of organizations to challenge social norms and gender inequity.

Innovators Circle
Change Catalysts
E - Change
Idea Brokers
Women and Men Transforming Power

Contact Information – *www.genderatwork.org*

4. **InterAction: The Gender Audit: A Tool for Organizational Transformation**
(Washington, D.C., USA 2004)

The Gender Audit from Interaction's Commission on the Advancement of Women (CAW) provides a method for organizational self-assessment and action planning to enable gender integration in humanitarian and development organizations. The audit process detailed in the CAW software is unique, incorporating a holistic approach, integrating political and technical factors, enabling self-analysis, resulting in a plan custom fitted to individual organizations. CAW has found that the self-run audit process creates a level of energy and commitment that has been impossible to achieve through other methods. The Gender Audit uses a three-step process involving a questionnaire covering programs and organizational process, an organizational analysis and finally action planning. The CAW approach to the Gender Audit has been proven successful, creating more equitable and effective development programs.

Contact Information: *www.interaction.org*

5. **Canadian International Development Agency: Guide to Gender Sensitive Indicators**
(Québec, Canada 2003)

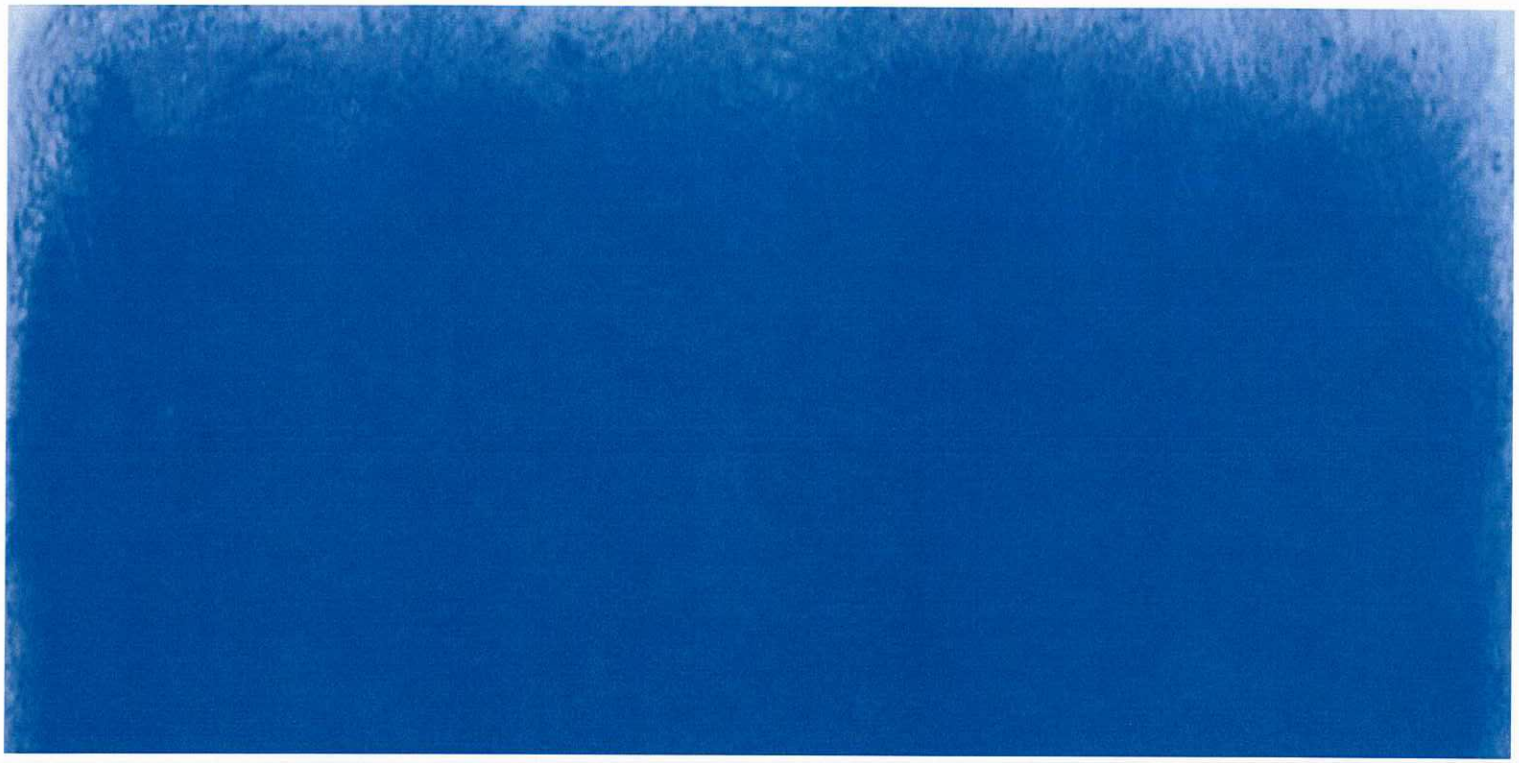
The Guide to Gender Sensitive Indicators focuses its methodology on "indicators" to enable more accurate monitoring and evaluation at the project level of gender equality programs. An indicator can be a variety of things, ranging from a measurement, to a number, to an opinion. Examining an indicator will enable the monitoring of a certain condition over time; tracking gender indicators shows the changes in men and women's positions over time. The guide uses an integrative strategy when focusing on gender-sensitive indicators combining quantitative and qualitative methods to track changes. Employing a baseline study, the guide enables the selection of appropriate indicators and objectives. Tracking the selected indicators will, over time, provide the organization with an accurate assessment of the gender conditions in the area of study, at the project level.

Contact Information: *www.acdi-cida.gc.ca*

6. **Negotiating Better Working and Living Conditions**
Gender Mainstreaming in Collective Bargaining
(Company Level Booklet 1)

ICFTU/International Confederation of Free Trade Unions and WCL/World Confederation of Labor
This guide to gender mainstreaming in collective bargaining was prepared by Jasna A. Petrovic and Agnieszka Ghinararu as a resource in union contract negotiations. Jasna runs the ICFTU women's network in Central and Eastern Europe and the New Independent States. The guide offers European case studies on family-friendly collective agreements and tips on how to prepare for negotiations along with suggested language.

Contact Information: *www.icftu.org*



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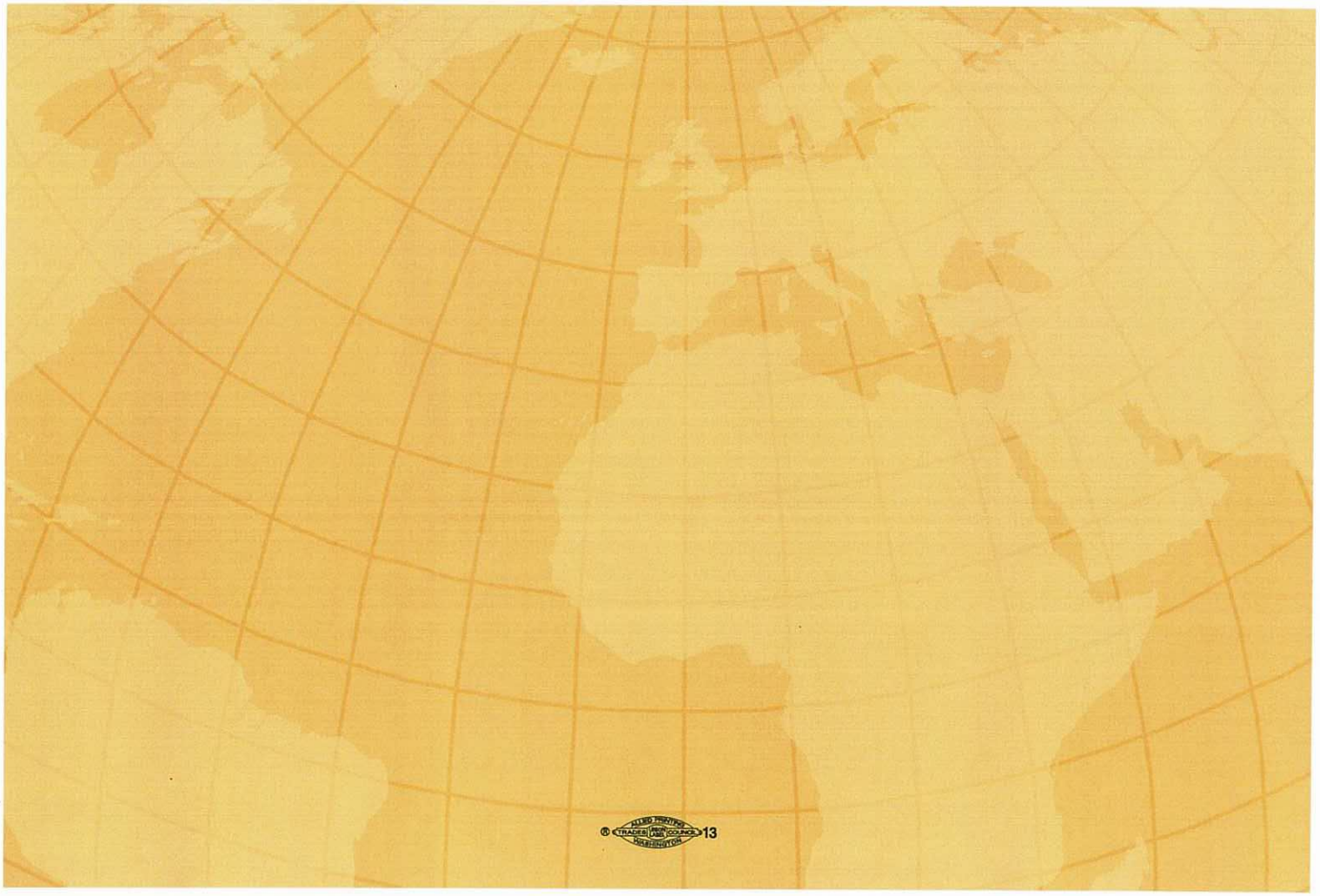

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