

2. Guidelines

2.1 WHAT IS GENDER EQUALITY TRAINING (GET)?

Equality competence in public policy refers to the capacities, peculiarities and behaviours that people need in order to integrate gender issues effectively. It requires recognition of the fact that no political and organisational action is gender-neutral and that women and men are affected by policies in different ways.

It implies a theoretical knowledge of gender 'concepts' and a practical knowledge of the various tools that can be used to integrate gender. It does not deal with 'women's issues', but seeks to promote reflection on stereotypes and gender roles of both women and men, with the aim of understanding what constraints hinder real equality.

To date, several efforts have been made to develop gender competence within the public sector, but gender *mainstreaming* and *empowerment* is not yet generalised. Such training, therefore, can and should encompass a wide range of different educational tools and processes, including in-person training events, curricula, staff induction programmes, online training courses, guidance materials and resource compendia, and networks for skills sharing.

At the organisational level, in each institution or organisation, 'gender competence' can be acquired through a specific learning process that includes the following aspects:

- a- human resources development: training provides participants with the knowledge, skills and values to contribute to the effective implementation of gender *mainstreaming* strategies in their sector, organisation and institution;
- b- organisational development: creation of management structures, processes and procedures that facilitate gender mainstreaming, both within the organisation and in its relations with different organisations and sectors (public, private and community);
- c- development of the institutional and legal framework: legal and regulatory changes that enable organisations at all levels and in all sectors to improve their capabilities.

These guiding principles represent the minimum standards that must be followed if institutions wish to design effective interventions for competence development. They are addressed to authorities designing gender equality training as well as to their staff. The skills and values acquired must contribute to the effective implementation of gender *mainstreaming* strategies in each sector.

For more information on GET please refer to the [toolkit of 'European Institute for Gender Equality \(EIGE\)](#)

2.2 WHAT IS GENDER MAINSTREAMING?

Gender mainstreaming has been adopted internationally as a 'strategy' to achieve gender equality. It involves the 'integration' of a gender perspective into the preparation, design, implementation, monitoring and evaluation of policies, regulatory measures and expenditure programmes in order to promote equality between women and men and combat discrimination.

The European Union supports gender *mainstreaming* as a political strategy, but this must also be reinforced with a legal commitment at the level of each member state. Individual institutions must

also take their share of responsibility. Achieving gender *mainstreaming* requires the development of comprehensive strategies for *policy makers* to acquire specific competencies. To this end, training and learning must become a natural part of gender equality work. Public institutions play a key role in planning, implementing, monitoring and evaluating gender competence development initiatives. The "guidelines" that are provided here as a summary of the E-Quality project are not intended to promote a one-size-fits-all approach for all institutional levels; rather, they summarise the necessary "common denominators" for all gender equality capacity-building initiatives. Taking into account the specific roles and needs of the commissioning institutions, these guidelines offer specific guidance for each stage of the process.

The three stages of gender equality training

The European institute EIGE suggests some steps for good [training and on gender equality](#):

1. Planning phase

Preparing an effective competence development initiative requires :

- Assess the need for gender competence development initiatives;
- integrate gender competence development initiatives into the broader equality strategy;
- ensure that sufficient resources are allocated to implement the initiative and its *follow-up*;
- draw up a specific list of internal objectives;
- select a trainer with concrete competences and skills.

2. Implementation phase

Setting up a gender competence development activity that responds to the needs and roles of organisations:

- ensure active participation in the design of the initiative for the development of gender competence and learning needs;
- encourage staff to participate in the activity;
- plan and implement monitoring procedures.

3. Evaluation and *follow-up* phase

To ensure long-term results, it is necessary:

- establish a scoreboard;
- assessing the long-term impacts of training;
- provide space and support for participating staff to implement newly acquired knowledge

Preparing an effective gender equality skills development initiative means :

- Identify gender inequalities in their field of activity;
- Define gender equality goals;
- Taking gender into account in policy planning and implementation;
- Monitoring progress.

2.3 THE GENDER MAINSTREAMING CYCLE AND OPERATIONAL TOOLS

Gender mainstreaming requires both integrating a gender perspective into the content of different policies and addressing the representation of women and men in a given area. Both dimensions need to be taken into account at all stages of the policy-making process. Gender *mainstreaming* ensures that policy and legislative work is of higher quality and has greater relevance to society, because it makes policies respond more effectively to the needs of all and sundry - women and men, girls and boys. Gender *mainstreaming* makes public interventions more effective and ensures that inequalities are not perpetuated. It does not only aim to prevent the creation or reinforcement of inequalities, which can have negative effects on both women and men, but aims to identify inequalities and develop policies that aim to correct these inequalities and undo the mechanisms that have caused them, through analysis of the existing situation.

Integrating the gender perspective into a policy, therefore, means that gender equality, as a general principle, should be taken into account in all decisions, at every stage of the decision-making process, by all actors involved.

The policy process is understood as a multi-stage cycle, comprising the definition, planning, implementation and control (monitoring and evaluation) of a policy. In many cases, these stages become a cycle in which each step is repeated as changes occur. For example, when a policy is evaluated, it may detect new problems that need to be addressed for reprogramming. All this can be called, as EIGE suggests, a policy cycle.

The gender *mainstreaming* cycle can be adapted to different public policy and programming processes. There are specific 'phases' of the cycle and necessary elements to pay attention to within each phase.

There are also specific methods and tools for gender mainstreaming to be used at each stage of the cycle. Some methods and tools, such as consulting stakeholders or offering gender equality training to stakeholders, may be useful at more than one stage. Furthermore, it is important to remember that when collecting data, it should be disaggregated by gender. The [gender statistics database](#) is a useful tool that can be used to find reliable, comparable and up-to-date information on gender equality.

The gender mainstreaming cycle:

a) Define the needs framework: this is the starting point when defining the precise policy needs to be addressed by public intervention in a specific policy area. It is necessary to assess how and to what extent the policy is gender relevant and needs specific interventions to address gender gaps and differences. The first step is to collect all useful gender-disaggregated data and information to analyse the situation of women and men in the respective policy area. Specific methods that can be used at this stage are gender analysis and gender impact assessment. It may be appropriate to provide training to staff who will conduct the analysis.

b) Making the Plan: The Gender Equality Plan refers to the process of planning the implementation phase of policies or programmes from a gender perspective. It involves identifying the objectives of the gender policy and the appropriate approaches and interventions to achieve them and then planning the specific actions to be carried out to achieve the objectives and measures set out in the policy or programme. At this stage, it is important to analyse budgets from a gender perspective.

Gender budgeting is used to identify how budget allocations contribute to the promotion of gender equality. Gender budgeting shows how much public money is spent on women and men. It is a technique that can be used at the planning stage, but also to monitor ongoing programmes and to review past spending. Gender budgeting ensures that public funds are fairly distributed between women and men and also contributes to accountability and transparency on how public funds are spent. The EIGE Institute provides guidance on [gender budgeting](#).

During planning, one must not forget to establish indicators to monitor equality objectives: to measure and compare the effect of the policy or programme on women and men during the period of its implementation.

It is also important to define appropriate moments to monitor and evaluate the policy. Finally, when preparing calls for proposals in the framework of funding programmes or in the context of public procurement, gender-related requirements should be formalised.

c) Implementation and Enforcement: when implementing a policy or programme, ensure that all stakeholders are sufficiently aware of the relevant gender objectives and plans. If not, organise briefings and capacity-building initiatives according to staff needs. Training on gender equality to increase gender mainstreaming capacities in the field will usually be necessary for all actors who should contribute: researchers and researchers, proposal evaluators and assessors, monitoring and evaluation experts and experts, scientific officers and officials, programme committee members, etc. It is also important that support measures are put in place so that difficulties can be overcome during implementation and further guidance is available. Support can take various forms, such as:

- *Coaching* by an expert or gender expert;
- The existence of a gender focal point appointed in the department who can assist staff in integrating a gender perspective into their work;
- Sharing experiences, lessons and good practices on gender in a given policy area with colleagues. The creation of an informal working/support group on the issue should be considered.

d) Control and monitoring: In order to monitor progress and remedy any unforeseen difficulties, it is necessary to monitor the work in progress. This is necessary at programme level, but also at project level. Indicators must therefore be defined and specific monitoring activities planned and implemented. Data and information must then be collected on the basis of the defined indicators in order to verify whether the set objectives are being achieved. Gender-sensitive monitoring makes it possible to identify and close gaps and difficulties as early as possible, while it is still possible to introduce the necessary changes to achieve what has been planned. According to the time sequence of monitoring defined in the planning phase, *follow-up* is needed to ensure that everything is proceeding as planned. This exercise should take into account the indicators defined in the planning phase and lead to considering corrective actions if obstacles are identified in the process that can be immediately resolved. It is also necessary to ensure that the implementation of gender-related activities is monitored and reported on. Reporting on the results of monitoring contributes to learning what works best, which is of paramount importance. Monitoring obviously also promotes accountability: holding those responsible for implementing actions accountable.

In addition to monitoring, in itinere and ex-post evaluation should also be carried out, taking into account information and data collected and collated during the course of the policy or programme, as well as other knowledge and sources. Gender-sensitive evaluation should rely on evaluators with gender expertise, who are able to identify and apply evaluation questions and methods that

incorporate a gender equality perspective. To this end, it is crucial not to forget to formalise these requirements in the terms of reference of the evaluation.

In addition, it is worth considering conducting a gender-specific evaluation, focusing on the approach taken to achieve gender equality. Such an evaluation will significantly contribute to understanding what works well and where the difficulties lie, allowing the gender mainstreaming approach to be refined in future actions. Finally, it is important to make the evaluation accessible to the public and strategically disseminate its results to promote its learning potential.

In conclusion, it should be kept in mind that this is a learning process. The results, lessons learnt and recommendations resulting from the evaluation will be very useful in redesigning the institution's next policy or programme framework and may also feed into the work of other policy areas.

Basically, one must be clear about the tools to be used and the methodologies. Here is a basic outline of how to proceed:

Defining tools

Gender statistics;
Gender analysis;
Gender impact assessment;
Gender stakeholder consultation;
Tools of the plan;
Gender balance;
Gender procurement;
Gender indicators.

Instruments of action

Gender equality training;
Gender-sensitive institutional transformation;
Gender awareness.

Control instruments

Gender monitoring;
Gender assessment.

In conclusion, 'gender mainstreaming' remains the fundamental axis of the European Commission's equality policy, as outlined in the 2020-2025 strategy. The latter emphasises that "the inclusion of gender equality issues in policy-making in all fields" is the key to success, as the challenges facing the EU today all have a gender dimension. Any policy to address these challenges will only be effective if a gender perspective is taken into account at all stages of decision-making, from design to implementation.