



**GESI**  
GENDER EQUALITY AND SOCIAL INCLUSION

**STRATEGY  
IMPLEMENTATION  
GUIDANCE AND TOOL KIT**

**2024 – 2029**

PREPARED BY  
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# Introduction

Provided as the final document in a four-document series, this gender equality and social inclusion (GESI) Implementation Toolkit is provided as a supporting document to the ARA GESI Strategy and Strategic Action Plan (GESISAP). The Toolkit is intended to be used both in tandem with the earlier documents by the ARA, and as a stand-alone document that can benefit the ARA membership.

## The Purpose of the Toolkit

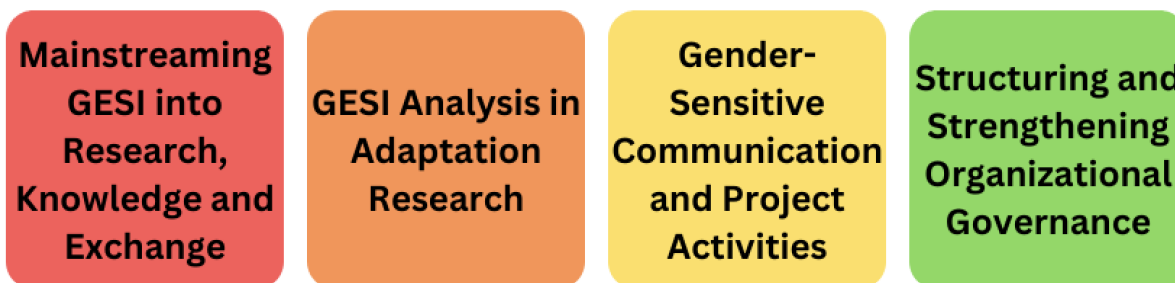
The purpose of this toolkit is to serve as a guide for the integration of gender equality and mainstreaming (GEM) into the operations and activities of the ARA and its membership. It serves to support the Gender Equality and Social Inclusion Strategy and Action Plan (GESISAP).

While this toolkit can stand alone in guiding actions for integrating GESI into the operations and work of the ARA and its membership organisations, it also serves to support the GESISAP in actions to be taken for effectively integrating gender equality into the functioning of the organisation, as well as to ensure that organisations applying for membership, and ultimately to function as host of the ARA are also addressing gender equality as both a cross-cutting theme, as well as a desired impact of their work.

The toolkit will address mainstreaming gender and GESI into key areas of the ARA operations, and into key areas of adaptation research and programming more generally.

## Toolkit Structure

Following the introduction of the structure and use of the Toolkit, the four key areas addressed in this Toolkit include:



The toolkit is structured in a way that makes cross-referencing easy and enhances quick accessibility of key sections. Each section includes:



## How to use the Toolkit

### The Overview:

The Overview of each section provides background knowledge (**THE WHAT**), and justification as to why GESI mainstreaming is necessary in each context (**THE WHY**). The Overview subsequently provides references to items in the Tools section.

### The Tools:

The Tools section (**THE HOW**) includes illustrations, checklists and informative tables that can be used in GESI mainstreaming efforts. The checklists are to serve as guides and are open to adaptation by users. Users and practitioners within the ARA Secretariat, the ARA membership and the wider network of adaptation actors are encouraged to document any edits and expansions or adaptations as these can be used in further iterations of these tools.

### The Resources:

The Resources provide links to videos, reports, research, manuals and additional toolkits that can further inform and support GESI mainstreaming actions. This Toolkit is not designed to break the mould, but rather to support and guide users to information and best practices that are well established in gender and GESI mainstreaming.

**Now, Let's get started!**

# 1| Mainstreaming GESI into Research and Knowledge Exchange

## Overview

Mainstreaming gender equality and social inclusion (GESI) into research implementation and knowledge sharing is necessary for promoting equitable outcomes and addressing inequalities. In the operational assessment of the Adaptation Research Alliance (ARA), the members identified two areas where the ARA can enhance engagement with its members to achieve the required gender equality and women's empowerment (GEWE) outcomes; gender-sensitisation and training and providing information and knowledge. The ARA GESI Strategic Action Plan (GESISAP) offers an Implementation Road Map, with an associated Activities Framework to enhance GESI mainstreaming.

### What is Gender Mainstreaming?

Gender equality does not simply mean equal numbers of women or men, nor does it mean treating women and men the same.

Mainstreaming a gender perspective is the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in any area and at all levels. It is a strategy for making the concerns and experiences of women as well as of men an integral part of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres, so that women and men benefit equally, and inequality is not perpetuated. It is very important to remember that gender mainstreaming is not an end, but a means to achieve gender equality. The aim or goal of mainstreaming is to ensure that women can participate on an equal basis with men, have equal rights and have an equal voice and influence in the decisions that affect their lives.

### The Essentials of Gender Mainstreaming

1. **Sex disaggregated data:** This reveals quantifiable differences between women and men in relation to poverty, income, education, health and participation levels, amongst others, and helps to better understand the context.
2. **Gender Analysis:** Gender analysis is about understanding the qualitative differences relating to women and men in any context. Gender analysis looks at the different roles and responsibilities of women and men, the assets available to them and their control over these (power). Such information helps appreciate the context as it affects men and women to ensure that our programming responds appropriately.

3. **Political Context:** This involves analysing, understanding and knowing about laws and policies and how they affect women and men (sometimes differently) as well as doing the same for customary practices and norms.
4. **Consultation:** Both women and men must be consulted with, and their views should be heard during programmes planning, monitoring and evaluation to ensure their different needs and priorities are understood and responded to. This may require talking to women and men separately to ensure all perspectives are heard.
5. **Stakeholder Engagement:** Women as well as men, all types and kinds of men and women, should be involved in the design of methodologies and/or programmes including those juggling multiple and intersecting vulnerabilities. This may imply actively promoting and supporting the involvement of women in planning and decision-making and ensuring that men support this.
6. **Gender-Sensitive Indicators:** Research, programme and project level objectives and indicators should reflect the anticipated changes, impacts and benefits for both women and men. The thinking behind the work of indicators is that What gets measured gets managed.
7. **Capacity Strengthening and Ownership:** Gender mainstreaming is only sustainable if the information and skills required are acquired by the organization or persons who are to carry out and take ownership over mainstreaming actions. Mainstreaming efforts should always include capacity strengthening components.

## Gender Analysis

A gender analysis helps us to understand men and women's roles and positions in society. It helps us to understand who does what and why and understand the power dynamics within the household and the wider community. The analysis of relations, roles and power can help to identify what makes certain groups of persons vulnerable, while also avoiding and/or correcting assumptions on benefits and risks. It also helps to determine what constraints or barriers might exist around meaningful participation and equal distribution of benefits in various activities or decision-making. A programme can then be planned accordingly to address the findings of the analysis, which exposes how target groups may be affected both positively and negatively from planned activities, as well as how they can contribute to maximizing and even improving activity outcomes. Key elements of gender analysis are depicted in Figure 1.

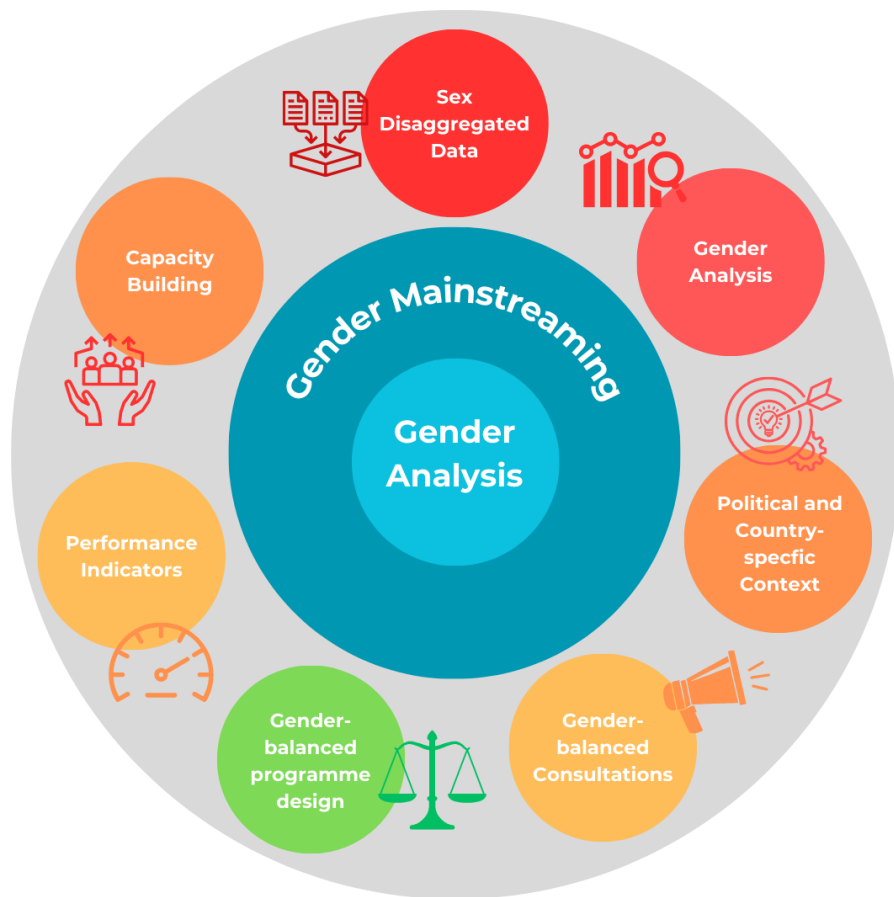


Figure 1: Gender Analysis & Gender Mainstreaming

A gender analysis ultimately leads to better programming: When the gender and social elements or implications of research or projects are better understood, outcomes can be targeted to benefit people’s different priorities, needs and capacities. making programs more relevant. Essentially, a gender analysis is key to good and gender-responsive programming. Analysis is only useful if it leads to action!

### Mainstreaming Gender into Research

In the context of research project and knowledge product development, GESI cannot be an add-on at the end of a research project, but rather must be prioritised from the beginning and implemented as an integral and ongoing part of the conceptualisation, planning and implementation, monitoring and evaluation.

GESI, gender analysis, gender mainstreaming and gender equality and women’s empowerment (GEWE) require the input of specialists and/or experts for best results. It is important that a research team include a gender specialist/expert or have access to this kind of expertise as required. For gender mainstreaming in adaptation, prior expertise and

understanding of adaptation contexts and how climate hazards affect people, and the livelihoods would be ideal. The GESI expert helps to determine the scope of a comprehensive gender analysis, leads in the development of GESI data collection methodologies, provides input into gender-sensitive communication and stakeholder engagement, and serves to communicate to the research team, beneficiaries, and other stakeholders the benefits of GESI, and its impact on long-term and sustainable outcomes.

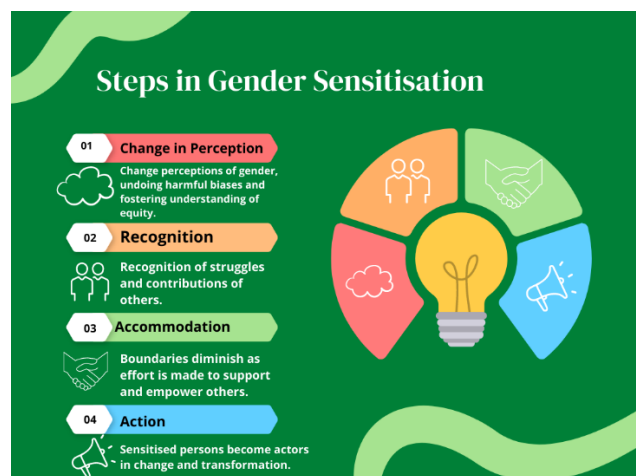


Figure 2: Steps in Gender Sensitization (Source: SAEDI Consulting)

A key role for the GESI specialist is to provide training and support in developing gender awareness and sensitivity in engaging stakeholders, data collection, and in ensuring that there is understanding of the roles and responsibilities of the team in safeguarding against exacerbation of inequalities and or other forms of discrimination.

Following capacity strengthening to support GESI activities, gender mainstreaming is required within research planning and methodological development. This step ensures that GESI is included in all phases of research, rather than as an add-on that exists in silo. Mainstreaming gender and/or GESI requires an informed assessment that can provide a baseline of the current circumstance, identify potential knowledge gaps or research questions, and inform the development of a mainstreamed research methodology. The larger process of mainstreaming gender analyses into research planning and implementation (illustrated in Figure 3) are outlined below:

### Step 1: Include Gender Expertise

Including gender expertise allows for

- Informed and targeted baseline assessment and preliminary research, to inform methodological design
- Development and continuous assessment of adherence to gender indicators
- Accurate collection and analysis of data
- Continuous knowledge sharing among research team, and other stakeholders
- Gender sensitive engagement with project stakeholders

### Step 2: Capacity Building & Training

Overall, the entire research team should understand and support the need for gender-disaggregated data collection and analysis. Gender-sensitization and training for team members might include:

- Gender-sensitive engagement

- Ethical data collection and informed consent
- Gender-disaggregated data

### Step 3: Identify Gender Indicators

Indicators identified in response to findings from a baseline assessment guide the collection of data and outcomes of research findings, and may consider such things as:

- Gender roles in the sector that is being researched
- Participation in the sector (% of women/men)
- Level of gender awareness of stakeholders/beneficiaries
- Capacity for gender-responsive finance (how to allocate funds)

### Step 4: Identify Social Prioritization

Baseline assessment, as well as findings throughout the ongoing research process, inform the identification of target groups that should be included to inform GESI findings. The identification of target groups should consider:

- Which groups are currently being impacted (both positively and negatively) within research context
- Which groups stand to be impacted within research context

### Step 5: Gender Analysis

Based on preliminary and project research, the analysis of data is presented in ways that highlights critical GESI findings. Things that can be considered in a GESI analysis might include:

- Impacts of researched sector or activity on different social groupings
- Impact of research outcomes
- Cultural barriers and challenges
- Understandings of gender
- Understanding of linkages between gender and research area
- Gender-responsive budget needs and challenges
- Data gaps and data collection needs



Figure 3: Mainstreaming Gender into Research

## Tools

As a team begins to conceptualise the research scope, methodology and outcomes, the following checklist for GESI in research planning (Table 1) is a useful tool for ensuring due consideration of gender equality and women’s empowerment, which ultimately enhances the real and lasting impact of the research.

This tool is useful to review the first draft of the research proposal or implementation plan. Use the list of questions to review the document. If there are more NO/N or TO BE DETERMINED/TBD than YES/Y, this is an indication that GESI is not mainstreamed into the project.

Gender expertise would be useful for identification of the insertion points for the correct questions and or actions, to ensure that the overall goal or objective, has a positive gender impact, and that questions and activities are crafted in a manner that supports gender equality and social inclusion.

Table 1 – GESI in Research Planning Checklist

GESI Analysis in Research Planning Checklist	Y	N	TBD
Are men and women equally visible in the research questions? <sup>1</sup>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have key/vulnerable groups within the project context/scope been identified using gender frameworks?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a clear gender objective or impact identified for the research?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a clear social inclusion impact identified for the research?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the research budget gender-responsive (i.e., allocations are based on the specific needs women, men and identified key/vulnerable groups) in the context of adaptation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will all data collected be disaggregated by sex, age, and other key demographics?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will men and women benefit equally/equitably from the project?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the project have provisions in place to minimize risk, and maximize benefits to identified key/vulnerable groups?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is/are the gender knowledge/skills of the research teams sufficient to fulfil the gender-specific TOR items and/or GESI analyses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a gender specialist on the research team, or available throughout the data collection and analysis phases of the research and reporting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<sup>1</sup> This may sometimes not be relevant if you have a very specific group focused on a group of women or men for a specific reason. If that is the case, then No is an acceptable answer.

## Resources

Additional resources are provided here to amplify the information provided in the section and to support users/practitioners in their work as newcomers or experienced adaptation experts. The list below includes three types of resources: informative videos, reading references as well as additional guidance in the forms of manuals. These all represent resources made available in the last 1-2 years:

**Video:** [From Knowledge to Practice: Mainstreaming Gender Equality and Social Inclusion in NbS for Adaptation](#). 2023. Aga Khan Foundation Canada.

**Reading:** [Handbook on Gender Mainstreaming for Gender Equality Results](#). 2022. UN Women.

**Reading:** [Ensuring Gender Equality and Inclusion in Climate Research](#). 2024. Climate Adaptation & Resilience.

**Reading:** [Feminist climate justice: A framework for action](#). 2023. UN Women.

**Reading:** [The Social Inclusion Assessment Tool \(SiAT\)](#). World Bank.

**Manual:** [Mainstreaming Gender Equality and Social Inclusion in Nature-Based Solutions for Climate Change Adaptation](#). 2024. International Institute for Sustainable Development.

## 2| GESI Analysis in Adaptation Research

### Overview

Fundamental to mainstreaming of gender equality and social inclusion into research is gender analysis<sup>2</sup>. It is vital that the ARA, its members and host organisations ensure that gender analysis is used to inform who conducts research and who benefits from such research. Gender analysis should be both quantitative and qualitative, and uses an intersectional lens, thus ensuring all social variables that can promote gender equity, or exacerbate inequalities, are identified and steps taken to minimise any negative impacts from research activities, particularly in the data collections stages.

Because gender inequalities co-exist with social exclusion and marginalization, gender analysis also needs to consider drivers of these as well and tends to inform not only a gender analysis but a social inclusion one as well.

Climate and adaptation research cannot be apolitical, meaning, it cannot exist outside of the political and social contexts. Ultimately, adaptation research and programming respond to the needs of persons to adapt to climate impacts. Therefore, the incorporation of GESI analysis in adaptation research and project activities facilitates a human rights and well-being framework, by enabling the analysis of linkages and intersections between climate issues, adaptation efforts and socio-economic impacts and intended outcomes. This ensures that research outcomes, recommendations and subsequent programming can truly meet the needs of all social groups.

### Tools

**An illustration of gendered considerations within the context of adaptation and resilience is provided in the Tools section (Figure 4).**

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<sup>2</sup> Identifies the differences between and among women and men relative to their position in society, and the distribution of resources, opportunities, constraints and power in a given context (EIGE).

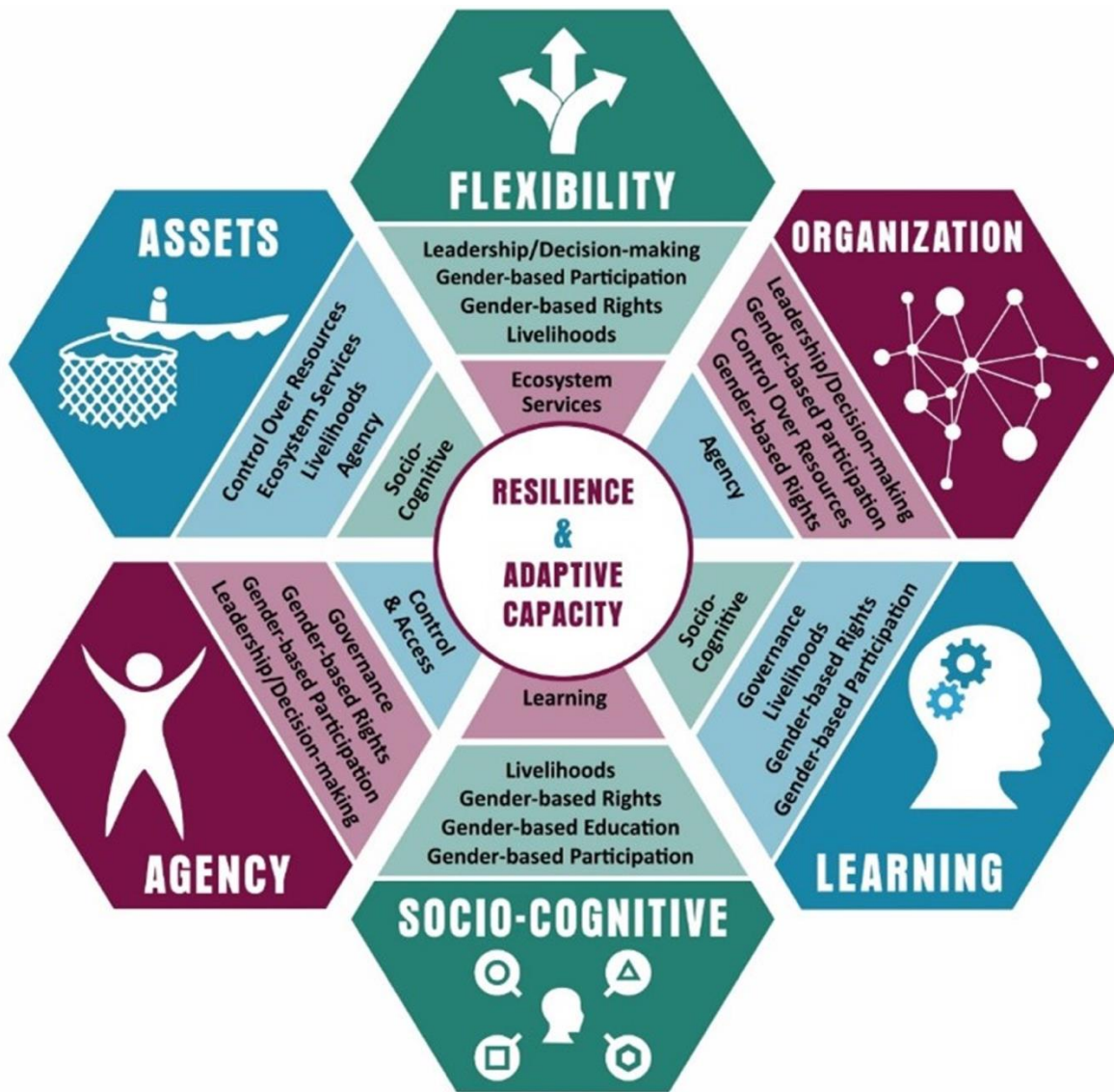


Figure 4: Gendered Considerations for Adaptive Capacity

## Gender-Responsive Climate Budgeting

In order to respond to climate finance needs, climate and adaptation funding organizations including the Green Climate Fund, Global Environment Facility, and the Adaptation Research Alliance have integrated the need for gender or GESI analysis and action plans within climate funding proposals, along with a gender-responsive budget.

Gender responsive budgeting (GRB) includes integrating gender equality strategically and practically at the levels of research, planning and implementation. GRB is not about creating separate budgets for gender outcomes, but rather budgeting for the mainstreaming of gender throughout the project process. GRB presents an opportunity for effective

collaboration between social and environmental sectors within the project context. Gender responsive budgeting (GRB) is a strategy applied in developing budgets, which ensures that the differential needs of men and women are adequately resourced. More specifically gender-responsive climate budgeting (GRCB) is the approach that ensures that climate finance mechanisms are inclusive and equitable, as well as promotes gender equality while addressing climate related issues.

Accepting that projects are finite, the GRCB approach therefore seeks to ensure that resource allocations are adequate to address the specific climate need, while addressing both practical and strategic gender needs. While all budgets, given the context and climate issues being addressed, will not likely be able to address every gender need, it is critical that each project has the capacity to address specific gender needs, in an effort to improve gender equality.

Table 2 below provides an example of how a climate mitigation project, using the GRCB considerations can address some strategic gender needs.

*Table 2: Sample of using GRCB to address Strategic Gender Needs*

<b>Establishment of Women-led Renewable Energy Cooperative</b>	
<b>Description</b>	This activity involves creating cooperatives where women are trained and supported to manage and operate renewable energy systems, such as solar panels or biogas plants.
<b>Key Components:</b>	<ol style="list-style-type: none"> <li>1. <b>Training and Capacity Building:</b> Provide technical training to women on the installation, maintenance, and management of renewable energy systems.</li> <li>2. <b>Leadership Development:</b> Offer leadership and business management training to empower women to take on decision-making roles within the cooperative.</li> <li>3. <b>Access to Finance:</b> Facilitate access to microfinance or grants to help women start and sustain their energy businesses.</li> <li>4. <b>Community Engagement:</b> Engage the broader community to support and recognize the role of women in renewable energy projects</li> </ol>
<b>Impact:</b>	<ul style="list-style-type: none"> <li>● <b>Economic Empowerment:</b> Women gain new skills and income-generating opportunities, enhancing their economic independence.</li> <li>● <b>Participation and Decision-Making:</b> Women take on leadership roles, increasing their influence in community and climate-related decisions.</li> <li>● <b>Sustainable Development:</b> The community benefits from clean, renewable energy, contributing to overall climate mitigation efforts.</li> </ul>

## Tools

The EnGenDER *Gender & Climate Resilience Series* (March 2022) offers a 5-step guide, or checklist of sorts, (see Figure 5 below) for GRCB from planning to monitoring & evaluation. As always with the development of tools, this is fairly general, and therefore the ARA will need to ensure that applications of this tool are contextualised.



Figure 5: Gender-Responsive Budgeting for Climate Action (Source: [EnGenDER, 2022](#)).

A Project Financing Checklist (Table 3 below) is also useful for developing a project budget, which is adequate to achieve the goals of the project, but also provides guidance for resource allocation per activity to ensure that GESI targets are met.

The checklist is a guide to be used at the very beginning of budget planning, and the expertise in Gender Responsive Budget (GRB) would be useful in providing the team with guidance on how to develop a Gender Responsive Budget.

*Table 3 – Gender-Responsive Project Financing Checklist*

Project Financing Checklist	Yes	No	TBD
Is there any member of the Project Management Team who understands and or can apply the principles of Gender Responsive Budgeting (GRB)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was there a gender gap analysis to inform the development of the budget? And has this analysis been informed by consultation with vulnerable groups?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has consideration been given to application of resources to ensure equitable outcomes for women, men, girls, boys and other vulnerable groups in and from adaptation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the budget allocation considered adequate to respond to identified gender targets/indicators?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the budget allocation considered adequate to respond to the unique needs of marginalized and vulnerable groups?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Resources

Additional reading resources are provided here to amplify the information provided in the section and to support users/practitioners in their work as newcomers or experienced adaptation experts. These all represent resources made available in the last 1-4 years:

**Reading:** [Why Gender Matters in Climate Finance](#). 2024. The Commonwealth.

**Reading:** [Gender-Responsive Climate Budgeting in the Caribbean: Closing the Gender and Climate Budget Gap](#). 2023. UN Women.

**Reading:** [Climate Migration: Unravelling the Nexus Between Climate Change Migration with an Intersectional Focus](#). 2023. CSTEP.

**Reading:** [Enabling gender and social inclusion in climate and agriculture policy and planning through foresight processes: assessing challenges and leverage points](#). 2023.

**Reading:** [Gender-Smart Agriculture: An Agenda For Gender And Socially Inclusive Climate-Resilient Agriculture](#). 2021. CGIAR.

**Reading:** [Putting Gender At The Heart Of Climate Security](#). 2022. CGIAR.

**Reading:** [Background Paper On Mainstreaming Gender Into National Adaptation Planning And Implementation In Sub-Saharan Africa](#). 2020. CGIAR.

**Reading:** [Gender Responsive Climate Budgeting Handbook](#). 2021. UNDP.

### 3| Gender-Sensitive Communication & Project Activities

#### Overview

GESI in communications or GESI-sensitive communications is aimed at ensuring that in both language and intent, information shared, does not perpetuate gender stereotypes. It also gives value to knowledge and expertise of women and other diverse groups. Critical to this, is that an intersectional lens is applied, thus ensuring that women are not treated/viewed as a homogenous group, and are in fact considered in all their diversity, capturing race, religion, socio-economic status, livelihood and income sources, head of household status and other social factors that can impact privilege and discrimination in the lives of women.

While this toolkit uses the UNDP guidelines to develop the Guidelines for Gender-Sensitive Communications (see the Tools Section, Table 5, page 18) which can be used by the ARA and its membership to examine the gender sensitivity of its communications materials and activities, Table 4 (below) offers a comparative look at the guidance principles from the European Institute for Gender Equality (EIGE) and the United Nations Development Programme (UNDP).

*Table 4: Principles for Gender Responsive Communications*

EIGE <sup>3</sup> Key Principles for Inclusive Gender Language	UNDP <sup>4</sup> Principles of Gender-Sensitive Communications
<ol style="list-style-type: none"><li>1. Recognise and challenge stereotypes</li><li>2. Be inclusive and avoid omission and making others invisible</li><li>3. Be respectful and avoid trivialisation and subordination</li></ol>	<ol style="list-style-type: none"><li>1. Ensure that women and men are represented</li><li>2. Challenge gender stereotypes</li><li>3. Avoid exclusionary forms</li><li>4. Use equal forms of address</li><li>5. Create a gender balance</li><li>6. Promote gender equity through titles</li></ol>

**Additional guidelines and key considerations for gender-sensitive communication are provided in the Tools section (Table 4).**

#### Stakeholder Engagement

Stakeholder engagements are a critical component of research as well as to microgrant projects, and therefore a significant part of the work of members of the ARA. Like communications materials, the use of language must be intentional when engaging with

<sup>3</sup>[https://eige.europa.eu/publications-resources/toolkits-guides/gender-sensitive-communication?back=&language\\_content\\_entity=en](https://eige.europa.eu/publications-resources/toolkits-guides/gender-sensitive-communication?back=&language_content_entity=en)

<sup>4</sup> Principles of Gender Sensitive Communication, UNDP Gender Equality Seal Initiative

stakeholders. In addition, the types of stakeholders engaged must reflect the diversity of the subject area, social context or geographic area relevant to the research or project.

Figure 6 shows how the gender lens is applied in stakeholder considerations. Note that these are not additional considerations, but rather a way ensuring that the nuances of gender and gender relations are adequately captured.

Figure 6 - Gender Sensitive Stakeholder Considerations (Source: SAEDI Consulting)



**A Stakeholder Engagement Checklist for Project Management is included in the Tools section (Table 5), along with a Stakeholder Engagement Checklist for a Research or Microgrant Project (Table 6)**

## Tools

Except in the case of very large projects, the communication budget is used to contract an external agency for the development of communications material. Whether these are public service announcements, flyers, or promotional giveaways, they are used to sell the project and therefore the language is important.

The project team can use the guidelines (see Table 4) in the first instance, for discussion with the communications team (whether internal or external). This helps to clarify the kind of language and graphics to be used to sell the project.

It should be noted that gender-sensitive communication does not only apply to the promotional material, but to all documentation related to the project. Therefore, another application of this guide is in the reporting of the project; that is monitoring and evaluation reports, stakeholder invitations, and other forms of correspondence and reporting can all be crafted with these same principles.

The considerations aligned to each principle serves as a tool of assessment for current communications material on the website, and other social media platforms, policies and forms used to engage the membership, microgrant applicants and or other stakeholders, as well as ensure gender sensitivity in the development of new material. Consistent application of these guidelines and the corresponding questions will increase the capacity of stakeholders to address inclusivity and intersectionality in all of their work and will also build knowledge and understanding of gender equality and women’s empowerment.

*Table 5: Guidelines for Gender-Sensitive Communication*

Guidelines	Considerations
Ensure men and women are represented	<ul style="list-style-type: none"> <li>- Include quotes from both men and women?</li> <li>- Reversing stereotypes, voice and visibility gaps (i.e. using the voice of a female in a traditionally male role).</li> </ul>
Recognise and Challenge gender stereotypes	<p>Ensure that the language does not</p> <ul style="list-style-type: none"> <li>- Patronise or trivialise women, gender inequality or social inclusion,</li> <li>- reinforce stereotypes of roles or images of women and men, girl, boys, young people, the elderly, migrants, PWDs, Indigenous and Tribal Peoples or the LGBTQIA+ community/</li> </ul>
Avoid exclusionary forms/Avoid omissions	<ul style="list-style-type: none"> <li>- Do not use language that excludes anyone based on gender, gender identity, sexual identity</li> <li>- Avoid associating women, men, vulnerable groups (in words, graphic and pictures) with entrenched and traditional gender roles, professions and or expression</li> </ul>
Use equal forms of address/avoid trivialisation and subordination	<ul style="list-style-type: none"> <li>- Avoid addressing or introducing women in their role in relation to partners (e.g. “wife of”). Use instead professional titles such as Dr, or Professor. <b>Ms</b> is the most acceptable term in the absence so clarity of title.</li> <li>- it is important to be mindful and respectful of how individual women prefer to be addressed. For example, if a woman refers to herself as ‘Mrs.’, or adopts her husband’s name in correspondence, it is important to respect this choice and subsequently refer to her with the name of her choosing.</li> </ul>
Create gender balance	<ul style="list-style-type: none"> <li>- Be mindful, and avoid as far as possible, the use of the gender nouns and pronouns intended to be used for both women and men (e.g. he, mankind).</li> </ul>

Guidelines	Considerations
	<ul style="list-style-type: none"> <li>- Use generic and gender-neutral terms such as colleagues (instead of ladies and gentlemen) when addressing a group of contemporaries</li> <li>- Other neutral expressions such as diplomats, medical professionals, teachers are all acceptable</li> <li>- Understand balance is not only 50/50 but also about representation of voices and ethnicities and also about historical marginalization that needs to be corrected</li> <li>- Ensure images show diversity of sex, gender, race, and location</li> </ul>
Promote gender equity through titles	<p>Titles for people and occupations often reflect inequitable assumptions about males and females; gender-sensitive language promotes more inclusive and equitable representations for both females and males.</p> <ul style="list-style-type: none"> <li>- Instead of ‘career woman’ use professional</li> <li>- avoid feminine suffixes such as –ess or –ette (e.g., flight attendant instead of stewardess)</li> <li>- use images that show women and men in non-traditional roles/professions</li> </ul>

Stakeholder engagement is an activity where communication is extremely important, and therefore the guidelines outlined in Table 4 are applicable. Table 5 (below), the *Stakeholder Engagement Checklist*, is also useful in developing the stakeholder engagement tools such as questions for interviews, focus groups or surveys.

It is important for the project team to be clear about the target audience for each engagement. The checklist, with questions adapted (questions can be removed, as well as other questions added to suit the audience) is then used to guide the development of questions for engagement.

*Table 6 - Stakeholder Engagement Checklist for Project Management*

Stakeholder Engagement Checklist – Research Team	Yes	No	TBD
Has gender-awareness of the research team been considered in shaping the engagement and related questions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can members of the research team respectfully engage with stakeholders using gender appropriate language?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have any team members participated in gender awareness or gender sensitisation training?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the gender expertise on the team or available to the team?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Will gender awareness/sensitisation training be offered to team members who need it?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The ARA has an existing micro-grant application form and approval system, this checklist (Table 6) can be seen as a tool for assessing whether or not the applicant, through the implementation activities, is supporting GESI objectives of the ARA. This can be done in two ways.

1. The ARA can use the tool at the point of assessing micro-grant applications for approval. This may necessitate asking applicants to address gaps, and a second round of assessment by the ARA before approval of grants; or
2. The ARA can include the checklist, or an adapted version of the checklist, as part of the application process. This allows the applicant to address these considerations before submitting the application, thereby removing the need for the ARA to review the application, and possibly returning to the applicant for adjustments.

*Table 7: Stakeholder Engagement Checklist for a Research or Microgrant Project*

<b>Stakeholder Engagement Checklist – the Research/Project</b>	<b>Yes</b>	<b>No</b>	<b>TBD</b>
Are the gender dynamics of the community (geographic or professional) understood? Or a tool developed to confirm these?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are the intersectionalities of gender, race, religion, socioeconomics, and their impacts on privilege and discrimination understood and considered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are the unique communication needs of indigenous and migrant populations understood and considered?			
Is household headship disaggregated by sex?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are male and female heads of households consulted separately? With differentiated questions and approaches?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have intersectionalities of race, gender, economic status and other social dimensions of community members been considered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have existing gender inequalities been identified, and mitigation actions for minimum negative impact developed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have marginalized groups been identified based on need, research, experience and demand? Have engagement strategies been adapted to meet their adaptation needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have all media, advertising and materials prepared to promote and encourage participation in engagement been vetted for harmful gender-based stereotypes including those that systematically depict women and men as one-dimensional personalities and in ways that are not progressive or empowering?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Resources

Additional video, reading and guiding resources are provided here to amplify the information provided in the section and to support users/practitioners in their work as newcomers or experienced adaptation experts. These all represent resources made available in the last 1-3 years:

**Video:** [Mainstreaming Gender Equality and Social Inclusion in Development Programmes](#). 2024. Adam Smith International.

**Reading:** [Four Approaches to Making Locally Led Adaptation More Inclusive](#). 2024. Climate and Development Knowledge Network (a programme of SouthSouthNorth).

**Reading:** [Inclusive Language Guide](#). 2023. Oxfam.

**Reading:** [Feminist Approaches to Monitoring, Evaluation and Learning: Overview of Current Practices](#). 2021. Equality Fund.

**Manual:** [Gender Equality and Social Inclusion: Integration in Development Initiatives Training Manual](#). 2024. Source: MoPD Ethiopia, with support from Climate and Development Knowledge Network (a programme of SouthSouthNorth).

## 4| Structuring and Strengthening Organizational Governance

### Overview

The operations and activities of any organisation are guided by a system of standard operating procedures (SOPs), practices, policies and guiding documentation. These serve as the governance mechanisms that provide guidance and oversight for effective overall functioning of the organisation. Largely, these are internal to the organisation and guide the work of management and employees. The ARA is committed to supporting these efforts through its own GESI strategic action plan, and this Tool-Kit is another functional document which supports the mainstreaming of GESI into the principles and operations of organizations.

In the case of the ARA, as a coordinating body and as an example in the context of this toolkit which can be of use to any organization, the governance system is not solely about the functioning of the secretariat, but about how its members operationalise the values and impact principles of the ARA. Noting that the ARA is hosted by other organisations, it is vital that members and hosts clearly understand the standards and functions of the ARA. It is important that member organisations and potential hosts also address gender parity in their leadership through gender inclusion, ensuring diversity and inclusivity in their teams, and that gender equality and women’s empowerment is integrated in all policies and programmes. Ensuring partner and guiding organizations that influence and inform the work of the ARA have gender representation and priorities ensures that ARA can meet its own gender priorities and targets.

The ARA governance system consists of number of organs, which serves to manage and control the processes for the effective management of the organisation and its resources. Foundational to the gender mainstreaming efforts, is the ground of GESI principles within the governance structure.

Table 8 (below) serves as a guide of the roles of each governance organ in the gender mainstreaming efforts.

*Table 8 - GESI Considerations at Different Levels of Governance*

Level	Key Elements	GESI Considerations
Plenary and Membership	<ul style="list-style-type: none"> <li>The highest, and largest governing body. Responsible for the strategic direction of the ARA</li> <li>A part of decision-making processes to influence decisions</li> </ul>	Must ensure that the GESIS and Impact Principles are considered in decision-making, allowing for women and men to have meaningful

Level	Key Elements	GESI Considerations
Steering Board	<p>which hold significant strategic weight.</p> <ul style="list-style-type: none"> <li>• Elected by the Plenary</li> <li>• The decision-making body.</li> <li>• Responsible for ensuring that decisions are in keeping with the mandate of the ARA</li> <li>• Made up of individuals</li> <li>• Delegates authority to the co-chairs</li> <li>• Supports fundraising</li> </ul>	<p>participation, and their voices recognised in the process.</p> <p>While the Board is made up of individuals rather than organisations, they are nonetheless representative of member organisations of the ARA, and individuals largely influence the culture of their respective organisations. It is therefore important that in the election process, consideration be given to the gender mandate of each organisation, and how the values of the ARA are operationalised or influences the work of the member organisations</p>
Co-Chairs	<ul style="list-style-type: none"> <li>• Two Co-Chairs elected by the Board</li> <li>• Serve two-year terms</li> <li>• Provides overall strategic guidance</li> <li>• Makes decisions regarding ARA functions/activities guided by budgetary and other resources</li> <li>• Delegates authority to the Secretariat and ad hoc committees</li> <li>• Has joint responsibility for fundraising</li> </ul>	<p>As the organ with overall strategic responsibility, the Co-Chairs must be realistic in defining the direction of the organisation over at least a two-year period but giving due consideration for sustainability. It is therefore crucial that the Co-Chairs not only ensure that the ARA Impact principles guide work, but that there is due diligence at all levels, to ensure that the ARA is represented fairly, and that work seeks to be at organisational and outcome levels.</p>
Secretariat	<ul style="list-style-type: none"> <li>• Responsible for day-to-day activities</li> <li>• Coordinates the governing bodies</li> <li>• Reports to the Co-Chairs</li> </ul>	<p>The Secretariat, and Head of Secretariat can be considered the <b>inward-looking</b> organs of the governance of the ARA.</p>

Level	Key Elements	GESI Considerations
	<ul style="list-style-type: none"> <li>Overseas impacts of operations (considering cost, scope, risks and benefits)</li> <li>Leads on fundraising</li> </ul>	<p>It is critical that these organs not only support and ensure that the work of the other three organs are impactful. They should also ensure that the ARA itself adheres to its principles of inclusiveness and diversity, in its quest to influence its members in integrating gender equity in their work.</p>
Head of Secretariat	<ul style="list-style-type: none"> <li>Responsible for leadership and oversight of day-to-day operations</li> <li>Reports to the Co-Chairs</li> <li>Responsible for managing the human and financial resources of the Secretariat</li> </ul>	

**Grievance Redress Mechanisms**

A grievance redress mechanism (GRM) forms part of a strong governance system. It serves as a formalised way for individuals or organisations to raise concerns or complaints and ensures that these are addressed in a fair and transparent manner. Recognising that gender is a critical factor in the differential experiences of beneficiaries and stakeholders, a gender sensitive GRM is a useful tool for implementing organizations to address conflicts arising from project research, assessment and implementation.

A GRM for the ARA ensures that member organisations, as well as microgrant recipients, have a standard approach to address complaints, with effectiveness, efficiency and accountability.

A GRM must be standardized in order to ensure that all complaints are given the same level of efficiency. Figure 7 (below) provides a chart showing the flow of the process.

*Figure 7: Grievance Redress Mechanism Process*



Table 9 (below) provides at step-by-step guidance of actions to be taken at each stage of the GRM process. This is only an outline of the **process**, and it is therefore incumbent upon the ARA and its member organizations to recognise that each complaint must be viewed on its website own merit, and therefore at each step, there will be the need to ensure that questions and information gathered, is relevant and specific to the complaint at hand.

Table 9: Grievance Redress Mechanism

STEP	ACTIVITY
<p><b>1 Complaint</b></p>	<p>Complaints can be oral or written, however, in the case of an oral complaint, it must then be written up by the person<sup>5</sup> receiving the complaint and signed by the Complainant.</p> <p>The needs of the complainant should be facilitated, including culturally sensitive recipients, language translators, etc.</p> <p>The complainant should be fully informed and consent to the GRM process.</p> <p>Where necessary, anonymity and privacy of the complainant should be maintained by all means necessary.</p> <p>Review of the complaint should determine whether there is need to seek the cooperation of local authorities, given the extent of the grievance, and whether there is potential for exposure or further harm to the complainant.</p>
<p><b>2 Committee Convened</b></p>	<p>The Redress Committee<sup>6</sup> (nomenclature to be determined by the ARA) is convened to review the complaint and set a date for the first hearing. All parties to be present at the hearing are invited in writing.</p> <p>The committee must include sufficient gender-representation, and must should also consider needs of the complainant related to consent, privacy, and language facilitation.</p>
<p><b>3 First Hearing</b></p>	<p>At this hearing, both the complainant and offending parties are present, and are given an opportunity to present and defend as necessary. (In the cases of violence, where there is potential for retaliation, or where the complainant has requested to remain anonymous, complainant and offending parties should be kept separate).</p> <p>Also at this hearing, The Committee seeks clarity, and explores solutions, including any actions to be taken by the parties to resolve the issue.</p> <p>If a resolution is achieved at the first hearing, the salient points, actions to be taken (if any) and or agreed resolution is documented and signed by the Chair of The Committee, the complainant and the offending party.</p>
<p><b>4 Investigation</b></p>	<p>If the parties could not achieve a resolution at the first hearing, the Committee with set an investigation in motion.</p> <p>At the end of the First Hearing, the parties would be informed of</p>

<sup>5</sup> this is usually an HR officer in the organisation but because of the structure of the ARA, it may be someone in the Secretariat, or a member of a project or research team designated to do so.

<sup>6</sup> This can be a standing or ad hoc committee

STEP	ACTIVITY
	<ol style="list-style-type: none"> <li>1. The nature and period of the investigation</li> <li>2. The duration of the investigation</li> <li>3. The date of the Second Hearing</li> </ol> <p>The purpose of the investigation is to find any additional information to support the information provided by both the parties, as well as any other information that can inform a resolution.</p> <p>The Committee may also use this opportunity to explore resolutions to similar complaints, and the use of the legal option for redress.</p>
<p><b>5</b> <b>Second Hearing</b></p>	<p>The Committee presents the findings of the investigation.</p> <p>The Complainant and or Offending Party, are both presented with information that either disputes or supports their presentations, whether partially or fully.</p> <p>The may also presented with options for achieving a resolution, however this must be done with due care, to ensure that neither party feels forced into a corner, or that their rights are in any way violated.</p> <p>The parties are given the opportunity to consider this information whether it is done at the hearing, or parties are given extra time to consider it, can be determined by The Committee.</p> <p>If the parties can achieve a resolution, then this is documented and signed in the same manner as in Step 3 – The First Hearing.</p>
<p><b>6</b> <b>Appeal</b></p>	<p>Either party has the right to appeal the decision of a Hearing, using Arbitration or Legal Action within the jurisdiction of the complaint.</p> <p>The Committee may stipulate a time in which an appeal must be filed.</p>

In most organisations, grievance redress is handled by the Human Resources (HR) Department. Given that the structure of the ARA as an alliance, is different, a committee can be set up. It can be a standing committee (with representatives from ARA members for fixed terms) or an ad hoc committee that is constituted by calling for representatives as needed.

A third option, could be, should the complaint not be ARA-wide, but rather confined to one member, then that member organisation then convenes an ad hoc committee to address the issues. Regardless of the option used, the process remains the same.

While the governance system and GRM are not presented here as tools, understanding how GESI needs to be integrated into the overall governance system in general, as well as in particular organs and operations procedures, ensures that GESI is being addressed in a comprehensive manner as the ARA and its member organisation apply the toolkit.

The ARA, as a coordinating entity, looks to its membership for a host organisation that will lead the work of the organization for a specific period. It is therefore critical that gender as a lens of analysis and decision-making as well as gender equality as an outcome, be addressed at the membership level. The introduction of key principles for gender mainstreaming, as well as a gender marker system, and an obligatory commitment of member and host organisations supports the ARA in achieving its gender equality objective and upholds the impact principles of the ARA as well as the letter and spirit of the GESISAP.

It can be useful for an organization to require annual reporting to ensure GESI efforts are ongoing. The GEM (Table 10, page 28) and the Governance Considerations (Table 8, page 22) can both be applied at membership level to support annual reporting.

### **Gender Capacity Strengthening**

Building the gendered capacity of the organization through training, knowledge sharing, and peer-learning opportunities is critical for the continued growth of an organization, and for enabling its ongoing capacity to facilitate gender-responsive adaptation research and programming. Capacity strengthening training, knowledge sharing workshops and peer-learning outputs are just a few methods that facilitate a circular learning method, which aims to build knowledge based on previous experience and practice. A model for circular learning is provided in Figure 8.

# CIRCULAR LEARNING FOR CAPACITY BUILDING

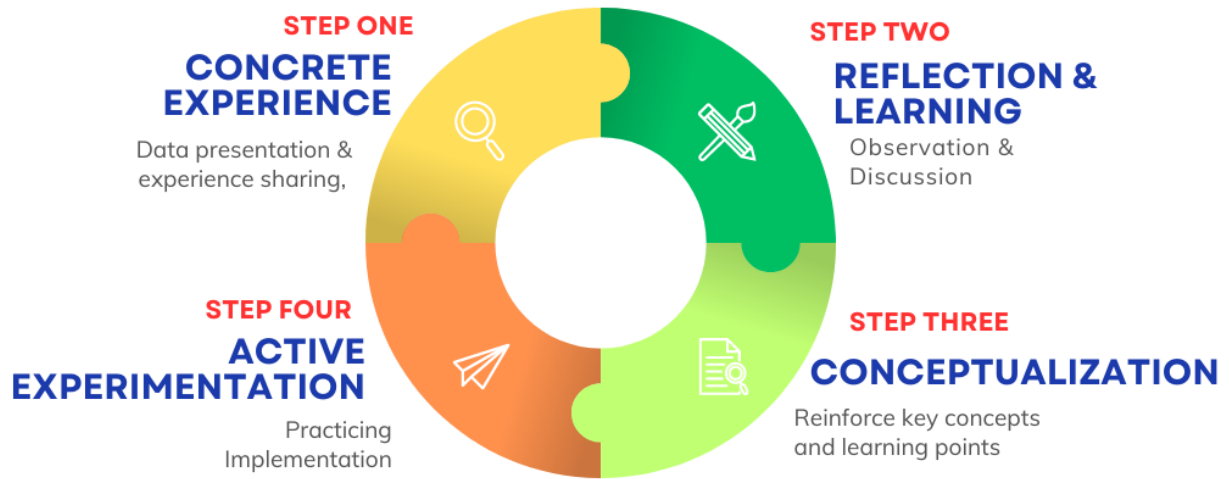


Figure 8: Circular Learning for Capacity Building

Capacity strengthening should be informed by an assessment of strengths, opportunities and priorities; this assessment has been conducted for the ARA and its membership, wherein the learning opportunities and priorities have informed the development of the ARA GESI Strategic Action Plan, and this GESI Implementation Toolkit. The Gender Marker (provided in Table 10) in tandem with GESI Governance Considerations (Table 10) are a good place to start a GESI assessment

## Tools

The gender equality marker as the standard within and across the membership of the ARA, and the ARA Secretariat, can be applied to development of projects and project budgets, further supporting the ARA’s vision of “enhancing the integration of gender equality. Integrating GESI into Communication, Reporting and Engagement.

Table 10: Indicative Gender Marker (Adapted from UN Women)

Code	Definition	Application Criteria
0	<b>Gender Blind:</b> Does not or is not expected	Neither the language nor intent provides for any change in relations of gender. This can be improved by revision

	to contribute to gender equality and women's empowerment	(for policies) to include gender-responsive language, and the development of targets and indicators (activities) to address improved GESI outcomes.
<b>1</b>	<b>Gender Neutral:</b> Limited contribution to gender equality and women's empowerment	Improvement in gender equality is incidental, and not a direct outcome. Improvement can be made by setting gender-responsive targets and indicators, to measure gender impacts and inform future activities.
<b>2</b>	<b>Gender-Sensitive:</b> Gender equality and women's empowerment is an objective (of the activity, budget, etc)	A gender analysis was, or will be conducted, and activities developed with the clear intention to work towards improving GESI.
<b>3</b>	<b>Gender-Transformative</b> Gender equality and women's empowerment is a primary objective (of the activity, budget, etc)	The sole or one of the primary aims is to enhance GESI, increase the agency of women, girls and vulnerable groups, and provide for the inclusion of key groups in leadership and decision-making to ensure long-term impact.

1. Check for use of specific words and phrases relating to promoting GESI, such as *gender, gender equality, gender equality and women's empowerment (GEWE), gender mainstreaming, women, men, people with disabilities, indigenous people (IP) rural populations, and intersectionality*. This is not an exhaustive list, and therefore the knowledge of gender and its associated language is important.  
The more often these words appear in the document, the more likely that gender and or GESI is mainstreamed.
2. Examine how the words (checked in 1 above) are used in the document. That is, check for context. This check should determine whether the language simply is there to say things like *gender will be considered* or *vulnerable and marginalised groups will be considered*, stopping short of anything that suggests that this will be done in any real way.
3. Identify entry points of gender. This is to address **how** those vulnerable groups will be considered; **what** will be done make gender both a tool of analysis and an and promote gender equality or equity. Gender entry points are those critical points in the document where the language can be expanded to show a clear understanding of

gender in terms of how data is collected, how budgets are applied or how targets, indicators and objectives are developed.

*By applying this process, any document (policy, applications forms, project implementation, etc) can be reviewed, and rewritten to integrate the principles of gender equality and social inclusion.*

The ARA has an existing process attaining membership, the checklist below (Table 11) can be used in addition to the existing application form, or the application form can be reviewed to include the specific questions that are necessary to ensure that the criteria for GESI, and the ARA requirements are met.

ARA members can also use this tool to assess their own organisations and adjust improve the own GESI goals and objectives.

*Table 11 - Membership Application Checklist*

Membership Application Checklist	Yes	No	TBD
Does the applying organisation have a gender policy or gender equality mainstreaming strategy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the organisation familiar with, and willing to adhere to the impact principles and the GESISAP of the ARA?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When developing research projects, does the organisation apply principles of inclusivity to ensure that the impact of its research fills an existing need?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the organisation consider the differential needs of women, men, girls, boys, and other diverse groups when designing adaptation research projects and or initiatives?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are local, traditional and/or Indigenous knowledge and expertise applied in adaptation research analysis/undertakings or advocacy of the organisation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does the organisation share research findings with beneficiaries and other stakeholders in ways that are, at least, gender sensitive?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the work of the organisation aimed at addressing the practical and strategic gender needs of beneficiaries for research projects, actions and interventions for climate adaptation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Resources

Additional reading and guiding resources from UN Women are provided here to amplify the information provided in the section and to support capacity development within organizations.

**Reading:** [Institutional Capacity Development on Gender Mainstreaming Implementation Framework](#). 2021. UN Women.

**Reading:** [Lessons Learned from Evaluations: Capacity Development in Governance & National Planning Programmes \(Eastern and Southern Africa\)](#). UN Women.

**Tool:** [Tool for assessment of capacity in promoting gender equality and the empowerment of women for the UN system and partners](#). UN Women.

## Summary Recommendations

The tools offered in this document are based on current practices used in social development, recognising that this is a dynamic area, it is suggested that as the ARA and its member organisations seem to apply any tools, that due thought is given to:

The context of the project, policy or activity under consideration

The intersectionality of gender, i.e., how race, class, sex, religion and other social factors impact gender norms, roles and realities

That no checklist in this document is finite, therefore each individual, team or organisation has the right to adapt the tool by adding or removing any questions as is necessary to reach their gender equality and mainstreaming goals

Gender expertise is a must, if GESI and gender mainstreaming is to be comfortable.

Above all we urge the users of the tool to build capacity in their teams, not just to use this specific toolkit, but to build skills and knowledge for gender equality and women's empowerment.