

ORGANIZATIONAL ANALYSIS¹

This tool identifies capacity building needs for developing a gender-sensitive organization. It analyses the current situation, in terms of the staff training available for developing gendered approaches to energy project formulation and implementation as well as the culture within the organisation to gender approaches. The Task Team could use the tool as part of a participatory self-assessment/evaluation.

Approach

A participatory workshop can be conducted with key personnel from different levels and departments in the organisation. It is best if the workshop is run by a gender expert.

Method

A facilitator will be required for a participatory workshop. A number of scenarios for an organisation's policy for capacity building and for changing the work culture, with different degrees of gender awareness, are developed around the three variables:

1. Capacity-building in gender awareness;
2. Managerial support for mainstreaming gender; and
3. Staff performance incentives for using gender-aware approaches.

The scenarios are then set out in the form of a ladder ranked in terms of moving from the worst case to the most desirable situation. Each "rung" on the ladder represents one scenario and is represented by a score. An example of a scenario matrix is given below. In the matrix, for each variable, the scales range from zero to three, although it is possible to put in as many "rungs" as you think desirable, reflecting low, medium or high scores. An assessment of where the current policy of an organisation is located on the ladder is made (remember an organisation will not always start at "0" and it can be on different "rungs" for different elements). This scoring process generates discussion and brings out any differences in perceptions and preferences among the various stakeholders. Low scores can indicate areas where the capacity of the organisation needs to be built.

The organisation can retain the results of the workshop and use it for monitoring progress with respect to gender sensitivity. The organisation should aim to move towards achieving the highest score in all categories (i.e. climb the ladder!).

Step 1

Identify variables and develop indicators of organisational policy options on gender-sensitive approaches to form the "rungs" of the ladder.

This can be carried out as a participatory exercise involving a small number of staff from different levels of the organisation and, in large organisations, different departments.

Step 2

Position the organisation on the ladder.

¹ Source: This tool is based on tools developed as part of the World Bank ASTAE Program's EnPoGen Project.

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This can be completed as a desk exercise following on from the options identified in Step 1, or it can be in the form of a participatory workshop with more representatives from the organisation than Step 1. Such a workshop could take around half a day depending upon how many policy issues are explored.

The facilitator needs to decide, depending on the number of participants, if the group needs to be divided into smaller sub-groups. The sub-groups could be divided by function and seniority (for example, separate groups for senior and junior engineers) in the organisation. The use of sub-groups is especially recommended in circumstances where there are clear hierarchical relationships among the participants. Such hierarchies may inhibit honest responses about the way the organisation operates. The facilitator will need to have assessed the situation before hand and decide whether or not help from additional facilitators will be needed. If sub-groups are used it will be necessary for the facilitator to collate and present the results after each sub-group completes its own clustering and labelling. An advantage of the facilitator presenting the collated results is that any major disparities among the different groups can be brought out without anyone feeling threatened.

Cards representing the different scenarios are prepared by a facilitator. The cards should not indicate the score allocated to the scenario. There needs to be one set of cards for each individual or sub-group.

First, a short presentation should be made explaining why these policy issues of the organisation in relation to gender equity have been identified by those organising the workshop. At this point there should be NO attempt to explain or justify particular policy options. These issues will emerge during the workshop. It should also be stressed that creating a gender-aware organisation is not so much an exercise of advancing one group (women) at the expense of another (men) - which is likely to meet resistance - but as an approach for improving human resources that will contribute to more effectively reaching strategic goals of the organisation.

The facilitator should then organise working groups if appropriate. The cards for the first policy issue to be explored are mixed up and given to individuals or working groups to sort from the least gender-sensitive to the most gender-sensitive. This is a thought-provoking exercise and time should be allowed for discussion in the working group.

Once the groups or individuals have reached agreement on the order, the individual or group chooses one card which best describes the current situation and marks this with a pin or sticker.

The cards are then posted on a pin board or laid on a table showing the order as well as the card selected to reflect the current situation. These results can then be discussed. Part of the discussion can involve adjusting the indicators so that they can be used as a monitoring tool to measure progress in reaching the desired best practice.

The group identifies the policy-level actions needed on the basis of the results. The facilitator encourages the group to prioritise and establish a logical sequence for the needed changes.

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An *illustrative example* of a scoring matrix for assessing the gender-awareness of organisations identified as partners in projects.

Scenario / Score	Capacity Building in gender awareness	Support from Management for gender equity	Incentives for using gender sensitive approaches
3	Organisation uses specialised personnel to design and conduct capacity building interventions and tools which include gender; capacity building events are part of regular training and orientation for all staff, are funded in balance with technical training (1:3), use participatory training methods and tools that are then applied in the field, and include poverty and/or gender sensitivity and equity aspects	Gender as a concept is defined correctly in project documents, and management can explain why a gender-sensitive approach is practiced; can describe what gender strategies are within rural energy projects and programs, and can recall some of the gender-differentiated effects of projects on women and men	Management and superiors formally acknowledge and appreciate attitudes and approaches that enhance participation and gender balance in processes and results; staff performance criteria include qualitative criteria and gender sensitivity and equity in activities, outputs and results
2	Capacity building exists for the social dimensions of energy problems and includes gender as part of regular training and orientation for all staff; funding is balanced with technical training (approx. 1:3). Participatory training methods and tools are used that are then applied in the field, but they do not cover gender sensitivity and equity aspects	Management sees new roles for women as a means to increase the effectiveness of projects and programs; the need for broader user choice of energy services is recognised but without sex differentiation	Management and superiors informally acknowledge and appreciate attitudes and approaches that enhance participation and gender balance in processes and results; staff performance criteria also include qualitative criteria (e.g. degree of community participation in planning and performance, etc.)
1	Capacity building exists in some social dimensions of energy problems, but not gender. However, events are ad hoc and under-funded (<10% of technical training); methods and materials are conventional (classroom lectures, handouts) and trainees are unable to apply what they learned in training in the field	Management defines women as passive beneficiaries or target groups for other programs	Individuals can practice a participatory, gender-conscious approach, but management and superiors do not recognise or appreciate these attitudes and actions; staff performance indicators are strictly quantitative (e.g. # of systems installed, % of funds disbursed, # of training programs held, etc.)
0	Funds for staff training are absent or <5% of investment funds; capacity and skills building and tools development do not include participatory approaches	Management is not conscious of gender issues in the energy sector, or considers them outside their responsibility	Gender consciousness in staff is not acknowledged by the staff's management and superiors; or, if acknowledged, it is not encouraged by management and superiors

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