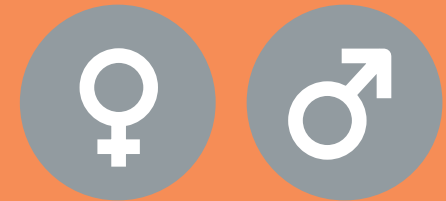


Just Progress!

Applying gender mainstreaming in Sweden



Foreword

At the 1995 UN Conference on Women in Beijing, the world community decided to revise its strategy for pursuing gender equality work. Previous approaches had not been sufficiently effective in bringing about equality between women and men. Now, instead, gender equality concerns were to be integrated into regular policy work and to be taken into consideration when crucial decisions were being made. This strategy came to be known as 'gender mainstreaming'.

The commitment to implementing this strategy added international legitimacy to discussion of women's and men's lives and conditions in spheres where gender had not previously been considered relevant or offered a basis for research and analysis. As a result, sectors that until then had never had to concern themselves with the respective circumstances of women and men suddenly had to take responsibility for gender equality. The decision to apply gender mainstreaming

also meant challenging ingrained attitudes, working methods and standards. Intense efforts are now under way in both Sweden and other countries to develop and test new methods and alternative approaches. Although much has been achieved in recent years, we still have a long way to go before we can say that the strategy has been implemented and we have fully realised the goal of a society based on equal rights, duties and opportunities for women and men. The Working Group for Method Development in Gender Equality at the Ministry of Industry, Employment and Communications began its work in 1998. Its task is to conceive, initiate and support new approaches to gender equality work. The Working Group has drawn on the experiences of others in this field and initiated method development projects. We would like to take this opportunity to thank all those who have contributed their knowledge and experience in one way or another.

Gender mainstreaming is a fairly new concept. There is no quick fix. For this reason we have to feel our way forward and share what we learn with others. The Working Group sees this book as a step in that direction. It represents one of the first collections of properly tested methods and models for gender mainstreaming to be published in this country. It will certainly not be the last.

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You have a job to do!

Introduction

Is gender relevant? Well possibly, most would say, but not all the time and definitely not in our area of work. And if equality is lacking in places, there's nothing we can do about it – that's up to others. It can't be our responsibility!

In Sweden, in Europe and indeed in just about all the countries of the world, people have decided to stop blaming others. For gender equality is only possible where people, women and men, are to be found. The statistics say a lot about the situation of women and men in our society. But we often find it difficult to see gender (in)equality in our own backyard, in our everyday lives, which together with other people's everyday lives make up our society. So before burdening someone else with the responsibility, why not take the opportunity to create equality between women and men in your own part of the world, in your own reality? Such a course is known internationally as gender mainstreaming. It implies that we are all responsible for gender equality.

The ambulance service in Göteborg felt it was responsible for running a gender neutral operation. It went without saying that

all persons were to be dealt with on equal terms, to be given the same level of care and treatment. This was enshrined in the policy documents. But did it reflect reality? Could it be that gender was a factor even when a person was in the direst of straits? The question was studied from all angles. Who were the ones who called the ambulance and how quickly did it arrive? And when it arrived – how was the patient treated? It turned out that more women than men used the ambulance service in Göteborg, which came as a surprise. But why were far more men rushed to hospital at top speed with flashing blue lights, while women were mostly taken there at normal speed? Could it be because women and men are rated and treated differently, or are men in a worse state when they call an ambulance? On what basis are cases assessed by the SOS alarm centre and does this reflect the actual needs of the

women and men concerned? The studies also turned up differences in the way women and men felt they were treated by the ambulance service. Women found the ambulance staff friendly but felt they were given too little pain relief. For men, it was the other way round. Was this, too, a reflection of differences in the way women and men were treated by staff and in the care and attention they were given? Such questions brought answers that led to further, more complicated questions about an area of work in which gender had previously been nobody's concern. The question of whether the declared aim of providing equal care and treatment to all was actually being fulfilled is still being studied by the ambulance service in Göteborg.

Gender mainstreaming is a strategy for integrating gender equality concerns into all policies and areas of decision-making and at

all levels. It is a way of working towards pre-determined gender equality goals. In this book, we have assembled a number of methods and models designed to support and facilitate gender mainstreaming. These have been tested by various organisations and thus are empirically based. The Göteborg ambulance service employed the 3R method to review and analyse its operation from a gender perspective.

There are also a number of methods for working with gender equality in staff matters and with gender equality plans at workplaces, etc. The manuals issued by the Equal Opportunities Ombudsman are one such example. None of these methods are discussed here, however.

The components required for gender mainstreaming differ little from other kinds of work for change. Senior management takes the decisions on change and inquires after the results as a matter of course and as a

basic necessity. A closer understanding of how one's own operation works is essential, and working methods and procedures need to be developed. Gender equality goals must be framed and managers must take a long-term organisational view, ensuring that the work moves in the right direction and that the various targets are met. The importance of following up and evaluating results cannot be emphasised strongly enough. It is also vital to ensure that the work receives proper backing, both organisationally and in resource terms, in the form of money, time and staff. All these components are to be found, in various shapes and forms, in the methods and models presented in this book.

Gender equality can be introduced – and must be introduced – in both large and small organisations, both private and public. The ways in which the work is pursued may differ depending on the size and nature of

the operation involved. The incentives may also differ. For a public organisation, gender equality is a matter of justice and rights, but may also improve quality and efficiency in the operation. For a private company, profitability and responsiveness to customer requirements may be the best arguments for gender equality.

The book is divided into three sections: 'Working Strategically', 'Steering Towards Gender Equality', and 'Review and Analysis'. In the first section, experience gleaned from several years' work with gender mainstreaming in various types of organisations is summarised in a model for systematic mainstreaming. It includes the experiences of the Ministry of Health and Social Affairs, which works in a similar way. The second section deals with the policy implementation aspect and shows how a number of 'normal', established models for administrative control can be used in order

to work with gender equality in a structured way. The third section discusses methods for reviewing and analysing an operation or activity from a gender perspective.

The title of the book – **Just Progress!** – is supposed to remind the reader that gender equality issues cannot simply be reserved for solemn occasions or brought to the fore only when the annual report is to be compiled. Gender equality is an everyday affair. Taken as a whole, the small, day-to-day decisions that each of us makes are of decisive importance for the operation concerned.

Working strategically

Some gender equality projects are like mayflies – a lot of energy and spirit while they're still around, but with brief lives that leave too little trace.

Work for change can be pursued in different ways. It requires determination, sensitivity and a systematic approach. In the following pages, we present a model for gender mainstreaming in three stages. It offers a basis for permanent change in the organisation's regular operation. The model is inspired by environmental management systems and constitutes a summary of the expert knowledge assembled by the various contributors to it. It should be stressed that this model represents a proposal. Those who find it helpful can use it in whatever way they wish. The book also describes the practical experiences of the Ministry of Health and Social Affairs in the gender equality sphere.

Three-stage model for gender mainstreaming

Here is a proposal for how a process of change can be implemented in three stages – inception, development and application.

Inception

Executive decision

Senior management takes a decision to mainstream gender into the overall operation. The decision is an expression of management's desire to create an operation informed by gender equality. It implies a commitment to pursue the work actively, to define what gender equality means in the organisation's activities (policy) and to develop these activities so as to meet the specified goals.

The decision is part of the organisation's normal decision-making process. The responsibility for gender mainstreaming is given to those who are normally responsible for this field of activity. Management allocates time, money and staff for the work in hand.

Initial management study

A description of the current situation may be needed as a basis for a gender equality policy. An initial study commissioned by senior management determines what gender equality will mean for the specific operation the organisation conducts.

Appropriate questions include: Are the goods or services involved used by both women and men? How does the operation meet the needs and priorities of women and men respectively? Which relevant laws, requirements, directives and objectives exist both within the organisation and without? How is the organisation managed? Are any particular policy instruments used? How is gender equality work currently being conducted in the organisation?

Policy for gender equality

The actual policy is a manifestation of senior management's intentions. It is based on the findings of the initial study and aims to formulate a consensus on what gender equality means for the organisation's operation. The policy expresses both what management wishes to achieve and what its commitments are.

The policy specifies the overall objective – an equality-based operation – and the interim goals. It states the need to draw up operational goals and details the working methods to be used to achieve change. It also provides guidelines for how the work is to be followed up and evaluated and for absorbing the results into the organisation's regular activities.

Development

Development programme

A development programme involves translating policy intentions into action. The programme is designed to ensure that working methods and procedures are altered so as to make gender equality an integral part of the operation. This involves reviewing and raising levels of knowledge, creating a support organisation for the work ahead and ascertaining the various ways in which gender equality may be given concrete form and made part of the policy control process. The programme should also provide for the development of follow-up procedures for gender equality issues as part of the organisation's regular activities. It contains interim goals, such as a requirement that each unit report by a certain date on

how gender equality issues are to be introduced into its activities. Work on the development programme is in the hands of the organisation's regular staff. The programme must also describe the tasks of the various members of staff and the responsibilities of each organisational function. It may be necessary to call in experts to assist in the work.

Review and analysis

An important step in the development work is a gender review and analysis by staff of their particular part of the operation. It is here that gender equality knowledge is merged with knowledge of the operation. Gender patterns and stereotypes are not to be reinforced but challenged! The chapter 'Review and Analysis' describes methods that may prove useful. This work is performed by regular staff with the help of a support structure, such as an idea group of internal and external experts. Forums where staff can exchange information and experience should be made available.

Application

Formulation of goals

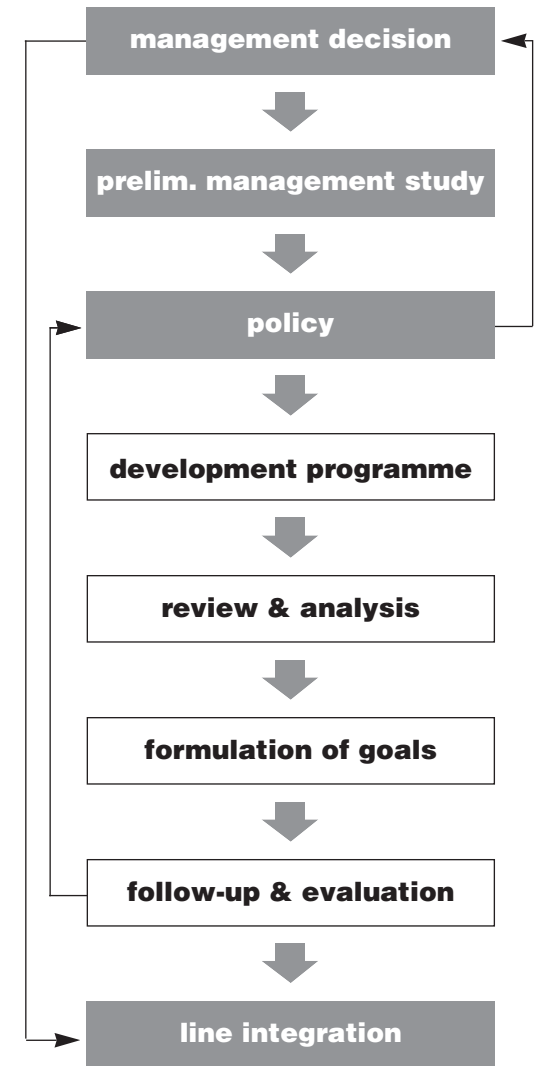
Formulating goals for gender equality means showing how the development work can be integrated into the organisation's regular structures. The work has produced the requisite knowledge and working methods, allowing concrete gender equality goals to be formulated at all levels of the organisation. The goals are introduced into the organisation's regular policy control systems, such as the operational plan or the policy documents. This work, too, is performed by regular staff, possibly with the help of a support structure. Read more about people's experiences of gender mainstreaming in management systems in the chapter 'Steering Towards Gender Equality'.

Follow-up and evaluation

Goals have to be followed up and evaluated. The overall policy objective of gender mainstreaming, for instance, must be followed up and evaluated. Staff should be offered support when the time comes to follow up operational goals. Also, the development programme itself reports on its progress at certain pre-determined times. The results achieved are compared both with the policy goals and with the goals set out in the programme directive. The follow-up and evaluation provide a basis for updating the gender equality policy, which is returned to senior management for a fresh decision.

Line integration

Now comes the serious part! Once the development programme ends, the next step is to fully integrate the gender equality issues into the regular operation. The gender mainstreaming methods have been decided. It is time for results. Each unit continues to draw up specific goals in policy documents that are to be followed up and evaluated in the usual way. Gender analyses of the organisation's operation are included in the annual report. A support structure for the task ahead will still be needed, but its composition may change. The responsibility for carrying the work forward and reporting on results lies with senior management while the actual work of attaining the goals is now distributed through the organisation.



Gender programme for social advancement

This is how the Ministry of Health and Social Affairs developed gender equality in its own sphere of activity.

Background

In response to the decision to let gender equality inform all aspects of Swedish government policy, the Ministry of Health and Social Affairs launched a development programme with the title 'Gender Programme for Social Advancement'.¹ The overall objectives of the programme were:

- Greater efficiency and quality in ministry activities through women and men being given access to care and service on equal terms;
- Greater job satisfaction among staff by the best possible use being made of staff resources
- Equality between women and men – via a high level of quality in both the services provided and the work performed.

The Gender Programme was divided into two stages

– the first focused on the development work of the ministry and its agencies. The initial goal was to ensure that by a certain date all the agencies had drawn up an action plan for working with gender equality issues in their operation. The aim was to mainstream gender into all normal ministerial and agency procedures.

An idea group was set up and a project manager appointed for the development work. It was decided early on to build up a support structure for the work and each agency appointed a 'gender liaison officer' as a programme contact. Responsibility for the actual programme work lay, and still lies, with senior management. The idea group contributed ideas, proposals for change and training and support.

Knowledge gathering

A precondition for successful gender mainstreaming is an analysis of the operation identifying the needs and capabilities of both women and men. In the Gender Programme these are called gender impact assessments, where the first step is the collection and separation of statistics by gender. Fresh inquiries are then instituted and the status quo is challenged. Are both women and men in a position to influence the operation and have their respective needs shaped the way the organisation's activities are run? Three agencies were instructed to provide gender impact assessments in limited areas, drawing on the Gender Programme. This work led to a report, *Utan spaning ingen aning* ('No Review, No Clue')(Ds 1999:33).

Skills development

The Gender Programme arranged a series of training courses addressing all levels of the organisation: basic training about the programme itself as well as training in preparation both for formulating the agencies' appropriation directions² and for following up the annual report. One of the training courses, for executive officers with specific responsibility for their agencies, involved evaluating to what extent the Gender Programme had been implemented in each respective organisation, on the basis of the annual report. In addition, seminars were arranged to allow people to discuss their experience of the Gender Programme and to provide skills development for gender liaison officers in both the ministry and the agencies.

Support structure

The Gender Programme found that staff needed to be supported in their development work. Such support, however, can take very different forms. The agencies felt that the best support the ministry could provide was in the form of clear, unambiguous directives and insistence on proper feedback and follow-up. The explicit feedback requirement contained in the Gender Programme proved effective.

Besides contributing to skills development, the Programme's seminars and training courses also served as important support for the work under way. In addition, agencies and units had recourse to experts when they wanted to organise seminars of their own or needed help at some stage of the work.

¹ See the glossary for a definition of gender ('genus' in Swedish).

² Appropriation directions are issued annually to the various government agencies as guidelines for their work. They are based on the objectives adopted by the Riksdag (Swedish parliament).

Administrative control

From the outset, the Gender Programme sought to identify the policy control systems involved and introduce a gender perspective into them. The ministry's appropriation directions gave the agencies explicit instructions. They were required to state in their annual reports what work had been completed in this field and what further efforts were planned. The work on gender equality was also raised in the annual discussions between ministry heads and the heads of agencies. This was a way of demonstrating the importance that the ministry attached to the need for good results from the agencies in this particular field.

Further development

On 1 July 1999, the first stage of the Gender Programme was completed. By then, all bodies coming under the Ministry of Health and Social Affairs possessed an action plan for gender mainstreaming in their respective fields. The work is described in *Från sidovagn till huvudfåra* ('From Sideline to Mainstream'); Progress Report from the Gender Programme for Social Advancement (Ds 1999:64). Stage two of the Gender Programme will run until 30 September 2001. It seeks to intensify gender mainstreaming in the work of the ministry and the agencies. The goal is to ensure that "every proposal tabled and every decision taken by the ministry and its agencies is preceded by a gender impact assessment that is openly reported and leads to action."

“In our assessment, the key to the success of the Gender Programme is precisely its clearly-defined goals and recurrent assignments – whereby each agency identifies which issues in its core activities should be tackled first – as well as the consistent follow-up it prescribes.”

From *Från sidovagn till huvudfåra* ('From Sideline to Mainstream'). Progress Report from the Gender Programme for Social Advancement. Ds 1999:64

Steering Towards Gender Equality

All operations are administratively controlled in some way or other. Such control may be more or less visible, more or less present. Some organisations work in traditional ways, others use special models for controlling policy. In addition, there is always a degree of tacit control – via the organisation's culture, its values and its norms. The 'invisible' norms, however, leave a visible stamp on the operation involved.

If an operation is to become informed by gender equality, gender must be mainstreamed into the organisation's policy machinery – into goal formulation, operational planning, follow-up and evaluation. The values and norms of the organisation must be questioned.

Here are some examples of how gender has been mainstreamed into different policy control systems – the budget process, the 'Balanced Scorecard', LOTS[®], indicators and sustainability systems.

Gender mainstreaming in the budget process

The City of Göteborg is now turning the goal of gender mainstreaming into reality. It is using its budget process as an instrument for the promotion of gender equality.

Background

Traditional planning of operations is to be found in all organisations and companies. A budget is drawn up along with an operational plan containing goals that are followed up and evaluated in the annual report. On the basis of the results, fresh goals are set for next year's budget, and so on. In large organisations, planning, follow-up and analysis may be divided into stages. Mainstreaming gender into traditional operational planning means specifying concrete goals both in the plans and in the budget, and having procedures in place for following up, evaluating and reporting the outcome.

For years, the City of Göteborg stated as one of its budget objectives 'the incorporation of a gender perspective into (our) activities'. Such generalised wording, however, proved inadequate. The goal had to be couched in concrete terms and procedures had to be developed for steering the organisation towards it. The City Administrative Offices are now conducting a project that aims to develop ways of integrating gender equality into all aspects of the budget process, as the budget is the central instrument of policy control. They are to deliver a report on the mainstreaming of the city budget in November 2001.

Budget basis

The budget process is based on the annual report showing the current state of affairs. A mainstreamed annual report is supposed to make clear to what extent the operation reaches women and men respectively and how it affects them. This was hard to detect in the City of Göteborg's annual report as very little information was gender specific. The project began therefore by going through the indicators that the city committees provide as a basis for the annual report. In collaboration with the various city departments, the project group checked whether existing indicators and statistics were an adequate basis for gender impact assessment of activities. New indicators were established that better reflected operational results from a gender equality viewpoint.

New directions

Directions as to how the annual report is to look are dispatched every year from the City Administrative Offices. The project group made alterations to these directions. In future, gender equality issues were to be dealt with under each field of activity instead of under their own separate heading. Operational results were now to be reported not only from a 'quality, production and economic perspective' but also from a gender equality viewpoint, i.e. how they reflected on women and men, girls and boys. A whole range of indicators were to be made gender specific.

Annual report

In the annual report for 2000, gender equality levels are more visible than before. Each area of activity shows what progress has been made on gender equality in that particular field. A number of indicators are gender specific. These include the proportion of girls and boys to have failed school-leavers' exams, the number of municipal transportation permits granted to women and men respectively and the number of hours women and men have been given access to municipal home help/special-needs housing subsidies.

Budget

Once the gender equality situation in the organisation's various fields of activity becomes clear, the city council can draw up specific goals for each area. Thus the overall goal of mainstreaming gender into the municipal operation acquires concrete form. The draft budget for 2002 contains gender equality goals and assignments for a number of different fields. The goal in the old-age care sector, for instance, is that requirements are to be assessed on the basis of each person's needs, irrespective of gender. The City Administrative Offices have been assigned to develop this objective. To meet the goal of an equality-based leisure sector, the city's leisure services committee has been instructed to examine its entire range of services from a gender perspective.

Follow-up

The new budget will be followed up in a new annual report. The gender-specific indicators will allow the project group to see whether the goals and assignments in the gender equality field have produced the desired results. The group has every hope of being able to proceed further and make gender visible in the various departments' own operational statements. This would make it even easier to follow up the gender equality goals and determine what additional measures are required for their achievement.

“We have revised and expanded the funding application forms used by our local associations and organisations so as to make clear the gender divisions among their board members, officials and employees, members and participants. [...] Using this as a basis, we have developed a quality instrument for following up this kind of funding.”

From the annual report 2000 of the Lundby District Council, Göteborg

“We know that girls are as active as boys in sport, but in different ways and at a higher cost. An aerobics or spinning session at the end of the school day could help even out the range of leisure-time activities available to boys and girls.”

From the City of Göteborg's draft budget for 2002

Balanced Scorecards

The Halland County Traffic Authority, Hallandstrafiken, has applied gender mainstreaming by means of ‘balanced scorecards’. This is a method for objectifying and quantifying gender equality and working with it in a structured way.

Background

The ‘Balanced Scorecard’ is an organisation management model developed by Robert S Kaplan of the Harvard Business School and David P Norton, a consultant. It uses a set of four perspectives to describe the operation concerned: customer, internal process, learning and growth, and finances. The model is designed to bring these perspectives into balance and avoid for instance subordinating all other aspects to the financial side of the operation. It is used by companies, government agencies and local authorities. Swedish companies often add a fifth perspective: staff.

There are also cases where organisations have added a further perspective, that of community benefit. Some projects have sought to bring gender mainstreaming onto the balanced scorecard. The example shown here is the Halland CTA Scorecard, developed as part of the Gender-Balanced Scorecard project in 2000.

Vision

The work of developing a balanced scorecard begins with the question: What are we here for? The company or organisation needs a consensus on the purpose of the operation. The Halland CTA expressed its vision thus: “We are to make public transport the primary travel alternative”. The gender perspective is not expressly included in this vision, but hold on a second...

(Cont. overleaf)

The Halland CTA Scorecard

Vision

We are to make public transport the primary travel alternative.

Strategy

Greater customisation

Finance

Strategic goal
We have a balanced economy

—————

Success factors
Our services are in demand from both customers and owners

—————

Control indicators
Total income
Income in relation to local and regional govt tax
Zero result

Customer

Strategic goal

80% of our customers, both women and men, are satisfied with our services by 2005.

Success factors

High frequency of buses
Well-treated customers

Control indicators

Satisfied customers, w/m
Number of complaints, w/m
Number of buses per route

Operation

Strategic goal

We have a high quality range of services customised to suit both women and men

Success factors

Flexible network of routes
Service-minded drivers

Control indicators

Walking distance to bus stops
Number of residents with X connections per hour
Proportion of satisfied customers, w/m
Proportion of new passengers, w/m
Number of journeys
Market share, w/m

Growth

Strategic goals

We ensure that we are doing the 'right' things. We also develop new traffic forms that increase availability.

Success factors

New roles THM/OP
Flexible traffic systems

Control indicators

Number of organisational changes
Number of creative proposals
Number of municipal transportation permits, w/m
Proportion of services certified as available

Staff

Strategic goal

We have well-motivated staff with the 'right' skills, evenly divided by gender.

Success factors

Interpersonal development talks. Gender equality in working conditions. Further training, in-service training

Control indicators

Staff barometer, w/m
Number of women/men, pay and position in the organisation
Number of training days, w/m
Number of internal communication meetings
Number of personal talks with staff

Community benefit

Strategic goal

We have owners who are satisfied with our contribution to community development

Success factor

Favourable community development

Control indicators

SatisfiedOwnerIndex, w/m
Environmental impact
Road safety
Travel on equal terms (gender)
Regional development

(Cont. from previous page)

Strategy	Success factors	Control indicators	Activities	Further steps...
<p>How is the organisation's operational concept to be realised? Which areas are we to give priority? Strategy means choosing – what to do and what not to do. Strategy expresses how an organisation is to work to make its vision a reality. In the case of the Halland CTA, it was: 'Greater customization'. This strategy, too, fails to formulate the goal of gender equality in so many words. But who are the customers that the Halland CTA wishes to adjust its services to suit? Women and men, of course. This emerged when the company specified its strategic goals for the different areas of focus. (See scorecard on previous page.)</p>	<p>Which areas are crucial to the success of the strategy? Success factors are those areas that the company must be proficient in if it wants to realise its operational concept. They describe a desired level of achievement, not how to get there. Of the success factors listed by the Halland CTA, one focuses explicitly on gender equality – equal working conditions for staff. A gender perspective can, however, be applied to the other success factors. This is done in the control indicators.</p>	<p>In order to make the success factors quantifiable, control indicators are developed. The indicators in a balanced scorecard do not necessarily involve figures but are supposed to serve as an instrument pointing the way to realisation of the vision. They may be a figure but they may just as well be a yes or a no, or a grade. Here, the inclusion of a gender perspective is important. As can be seen from the scorecard, many of the Halland CTA indicators are gender specific.</p>	<p>Once the indicators have been determined, it is time for concrete action – the organisation decides which activities and tasks are to be performed, who is responsible for them and when they are to be completed. These activities are written into an operational plan or the like. It is important to check when these activities have been completed and to follow them up. The indicators help show whether the various activities are moving the organisation towards its goals.</p>	<p>Gender-balanced scorecards are one way of objectifying, quantifying and working in a structured way with the gender perspective in various spheres, mainstreamed into an organisation. Assuming that the policy instruments work properly in an organisation (from goal to follow-up), and the gender indicators are concrete and quantifiable, an equality-based operation becomes more feasible. The Halland CTA has gone a step further and developed individual scorecards for its staff so they can see how their own efforts contribute to the achievement of the overall goals.</p>

Gender management systems

Environmental management systems are used to mainstream environment issues into company operations. A project entitled 'The Sustainable Company: Focusing on Gender Equality' sought to mainstream gender by similar means.

Background

Environment work and gender equality work both aim to alter normative practices. Environmental management systems like ISO 14001 have been developed as an instrument for changing environmental norms. A management system is a tool for creating structures, procedures and continuity. The demand for constant improvement is built into the system. 'The Sustainable Company: Focusing on Gender Equality', a project co-financed by the European Social Fund and the Swedish Trade Union Confederation, adopted a similar approach in the quest for gender equality. Based on research by Minna Gillberg of Lund University, a gender management system was developed and tested in a number of organisations.

Executive decision

The first step is for senior management to decide that the company intends to work actively to encourage gender equality in all areas and that a support structure is to be set up to help with this work – a gender management system. "Management's attitude – allowing gender equality work to cost both time and money as well as staff resources – is crucial! If the company really wants to change its norms and values, it has to work with the three dimensions of the normative model: intention, knowledge and supportive structures!"

(All quotes taken from *Den jämställda arbetsplatsen – en metodbok*, Eva Amundsdotter & Minna Gillberg, Bilda förlag, 2001.)

Review

The next step is to check the current state of gender equality at the workplace. This review of the situation will serve as a basis for the company's gender equality policy and future work in this area. To assist in the review, the project developed a toolbox with four drawers/areas deemed of special importance: representation, occupational structure, parenthood and external relations. Once the review has shown the present position, an analysis is required to determine why things are as they are. The analysis should find out what is considered self-evident at the workplace, what the prevailing norms are. This is a difficult, challenging task. For that reason, openness and proper support are important.

Policy

Having examined the situation, senior management formulates a gender equality policy together with those responsible for the review. The policy specifies concisely and unambiguously management's intentions and level of ambition. It establishes and records the fundamental commitments that management has made. It should also specify overall guidelines for future work with gender equality within the company. It may also contain concrete goals.

Goal formulation

Proper goals are fixed in time, explicit, realistic, challenging and possible to evaluate. They specify what is to be achieved, not how. The process of formulating goals was described in the project as almost physically painful while it was under way, but liberating in its usefulness once it had been completed. For the goals to have full effect, they must be widely endorsed within the organisation. "The more people who are involved in the work, who can recognise their own thoughts and visions in the final goals, the greater the impact in the organisation." It is a time-consuming process but it makes for greater efficiency.

Implementation

To realise the goals, an action plan is needed. Practical working methods must be developed with procedures, instructions and control mechanisms that will ensure that the company operation promotes gender equality. The programme supplies the framework, the supportive structures. It describes who does what, how and when. Responsibilities, powers of authority, resources and timetables are also established in the programme. Training is another part of this phase. All staff require basic training in gender equality. In addition, an understanding of the mechanisms of goal-oriented management is needed. The third training area looks at the norms and values that underpin gender patterns in the organisation.

Follow-up

The goals must be followed up regularly. Senior management and those engaged in developing the gender management system perform a follow-up, an interim evaluation. The results are measured against the company's gender equality policy and goals, and checks are made to ascertain that the company has complied with legislation and other rules, etc. "Enter the interim results in the gender equality plans and other documents so that others (in the company) can follow developments." The follow-up process sometimes results in the goals being reformulated.

Reporting

The follow-up serves as a basis for a report on the company's overall work with gender equality. The report is of course used for internal communication but may also be used externally. Documenting its work and being able to show where it stands on gender equality may help the company in its relations with customers, proprietary interests, government agencies, politicians, competitors and the media. Environmental reports are already a vital competitive factor and it is quite possible that gender equality reports may become so before long.

Evaluation

The final step in the circle is an evaluation of the gender equality work itself. Remember that this is a checkpoint in the search for constant improvement, not a final destination. Following evaluation, the work will continue round the circle to step 4, goal formulation, or if necessary to step 3, gender equality policy. It is largely the working methods that are to be evaluated here, not the goals. Questions that should be raised in the evaluation process include: Has the gender equality work been formulated in terms of the skills and needs of both women and men; in other words which values, norms and quality goals have governed our project? Has the work been based on gender analyses?



LOTS®

LOTS® is an instrument for planning, managing and following up an operation or activity. An organisation applying LOTS® can also use it to work systematically and in a structured way with gender equality.

Background

LOTS® is used by both companies and government agencies in Sweden. It seeks to create a common language for management and staff in the planning and development of their operation. Working with LOTS® means taking step after step in a process that begins with a description of the current situation and ends with an evaluation of the goals specified. Procedural and analytical work is given special support along the way.

There are examples of organisations using LOTS® to work in a structured fashion with gender equality, such as the Stockholm Social Insurance Office.

NUTEK¹ launched a trial project in 2000 using LOTS® to help it formulate a draft development programme aimed at strengthening the agency's work on gender equality in Sweden's regional growth agreements. Some of what it learned in the process will be used here to illustrate the various steps in the LOTS® system.

Reporting

“What happened in the past, what is going on today and what do we expect from the future?”

The process begins with a report. When a certain task or assignment is to be planned and performed – the framing of a development programme for gender equality, say – it is important to know where things stand. So a position report and an analysis are provided focusing on what has occurred in the past and what the future is expected to bring. A SWOT² analysis may be useful in this respect. Analysis questions may include: How is our gender equality work progressing today? What has worked and what has not worked? What does gender equality mean for our operation today and what will it mean in the future?

Aims

“What are we to do for whom and why?”

To move the work and the company in the right direction, a definition is needed of what needs to be done, why it needs doing and who the target group is.

NUTEK defined its aims thus: “NUTEK, in its work with regional growth agreements, is to integrate a gender perspective into both its procedures and its actions so that the quality of the regional growth agreements may be improved and they may thereby generate greater economic growth.”

Success factors

“What should characterise our operation if we are to become highly respected and successful?”

Once the aims have been defined, it is time to consider the operation's strengths and weaknesses. This will have an important bearing on how well the work is done. It is a matter of developing strengths and minimising weaknesses. (Here, the SWOT analysis may be a valuable tool.)

Below are the success factors that NUTEK considered important for its work:

“To inspire confidence and be successful, NUTEK's efforts to integrate a gender perspective are to be characterised by a high level of expertise and clearly delineated responsibilities, and be pursued by means of a concrete approach in which all participate.”

¹ NUTEK, the Swedish Business Development Agency.

² SWOT stands for Strengths, Weaknesses, Opportunities, Threats. The analyst places these factors in a four-field chart.

Goals

“What do we want to achieve in the long run and in the short?”

Before the practical work gets under way, a decision must be taken on what it is supposed to lead to, what is to be achieved. The goals for the work in hand are defined.

Some of NUTEK's proposed goals:

- *By (date), all new regional growth agreements are to be based, inter alia, on a gender impact assessment.*
- *By (date) at the latest, NUTEK's representation in the dialogue groups and action groups is to be at least 40 per cent female and at most 60 per cent male.*

Activities

“What should we continue doing, add and stop doing to achieve our goals?”

Once the organisation's sights are trained on the goals, it is time to decide which activities to pursue.

Some of NUTEK's proposed activities:

- *A review of the present situation as regards gender representation in the various groups.*
- *A plan of action for remedying imbalances in gender representation.*
- *Individual training for all NUTEK staff working with regional growth agreements on how to mainstream gender into them, to be completed by (date) at the latest*
- *Development of a model for gender impact assessments.*

Staff & Org.

“Who is to be responsible for what and how should we interact? What should we do to acquire the skills we need? What are the financial implications?”

Nothing gets done by itself, as we know. Responsibility for pursuing activities must be allocated, work must be organised and an analysis of which skills will be required is an important ingredient. What skills are available within the organisation? Do we need stopgap expertise or help from a consultant? And not least, how much time, money and resources will be needed for the work? An analysis question at this stage could be: How are responsibilities and tasks divided between women and men in the work that is to be done?

Reporting

“What needs following up and how can we best follow up so as to achieve our goals?”

The final task before the work can begin is to define how it is to be followed up and reported back. If the work is extensive, several 'checkpoints' may be required – interim reports at fixed intervals. This is to determine whether the work is proceeding as planned and to ensure that the goals will be reached on time. These reports may be provided as part of the organisation's regular reporting procedure, in half-yearly statements or annual reports, etc. Also the work as a whole is to be reported back on completion, and may then serve as a basis for further steps and fresh goals. Thus the process can start anew and the operation develop.



Indicators

Awareness about the situations in which inequality is created and indicators showing in what direction the work is going together provide the means for steering the operation towards gender equality on an everyday basis.

Background

Indicators are used to gauge whether an organisation is living up to its own operational goals. They are designed to measure the right things and the same things over a period of time. Indicators are also used in benchmarking, in order to compare different organisations with one another. The Östergötland County Administration Board tested gender indicators as a way of mainstreaming a gender perspective into its activities.

Crucial points

A job of work involves different kinds of input that together make up a process. Thus the outcome of the work process is the sum of all its various parts. If inequality is created in one of the parts, it will probably be carried along through the process – perhaps even reinforced at a later stage – and be difficult to correct after the fact. So analysing the end product is not enough. To bring about change, you have to intervene at the point where decisions are reached or choices made that affect gender equality in the end product. To identify these crucial points, a process chart is drawn up showing every stage in the work process.

Review

A process chart is a graphic image (often a flow chart) showing the various stages in a work process, the order in which they are completed and the way they are linked. Process charts can be jointly developed by someone unfamiliar with the details of the work process and the person working with this area of activity. The 'ignorant' party interviews the 'knowledgeable' one by putting questions like:

- What happens first? How do you work there?
- What does that lead to? How do you work with that?
- And what does that lead to? How do you work with that? Etc.

The interview continues until the whole process has been mapped out. A process chart is then drawn up, with different fields representing the different stages of work.

Analysis of the process

On the basis of the process chart, those work stages of importance for gender equality are analysed and identified, i.e. those parts where inequality patterns may develop or be broken up. Special attention may have to be focused on these parts, for instance by asking oneself a number of questions to check whether gender equality has been taken into consideration. Such stages are called input points. The adjoining process chart shows how the Östergötland CAB works with applications for business development funding.

From checklists...

Working with checklists to ensure that the operation has a gender perspective also means putting together a basis for following up gender equality issues in the organisation. The Östergötland CAB's indicators are based on the information the checklists have provided over a period of time.

The following points were formulated in a checklist for applications for business development funding:

1. Has a gender impact assessment been made as a basis for the project application? Yes/No
2. Does the application include a gender perspective? Yes/No
3. Will a gender perspective be taken into consideration at the evaluation stage? Yes/No

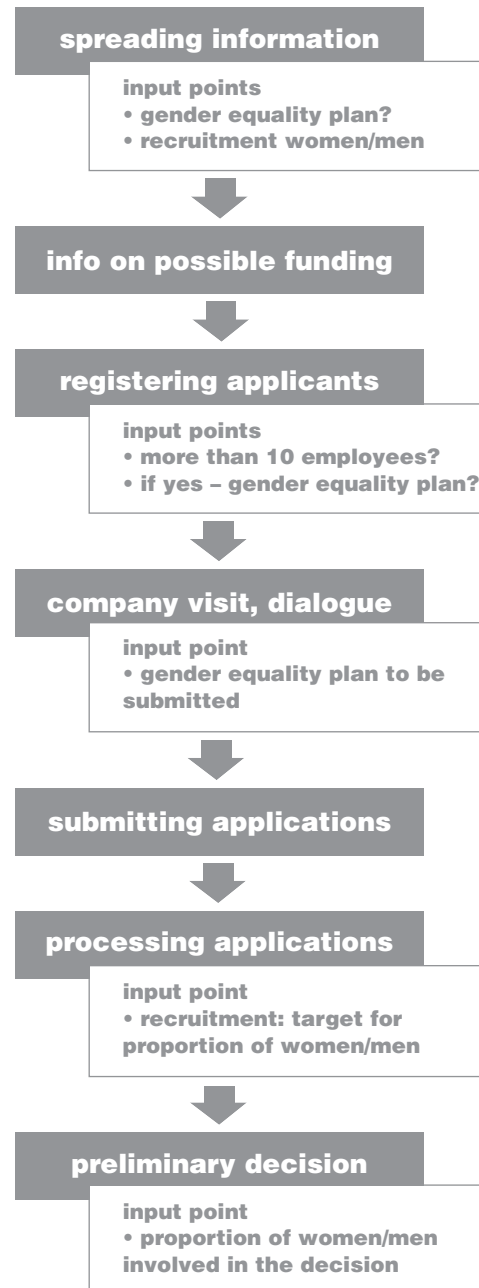
...to indicators

The annual report will then specify:

- The proportion of projects based on gender impact assessments.
- The proportion of projects working with a gender perspective.
- The proportion of projects completed during the year that included a gender perspective at the evaluation stage.

Setting goals

Once indicators have been developed, goals can be drawn up for coming years. In the Östergötland CAB project, area managers drew up their goals with the help of the county's gender equality expert. In the case of business development funding, the goal agreed on was to increase the proportion of women granted funding from 30 to 35 per cent the following year. This was a goal that the funding officer considered realistic. Once the goal has been achieved, new goals can be drawn up. The indicators can then show whether the work is moving in the right direction and the goals are attainable.



Example of a process chart – applications for business development funding

Review and Analysis

You can only draw up proper gender equality goals and bring about change if you are aware of how things stand in your company or organisation. The operation as a whole must be closely scrutinised and gender patterns must be exposed. Here are some methods that may be useful when systematically reviewing and analysing the respective influence of women and men in a particular operation, their contact with it and how it responds to their needs, situations and priorities. Remember, don't stop at the review stage. It is supposed to lead on to analyses, goals and action!

The 3R method

The 3R method is a review and analysis tool. It serves as an aid in systematically compiling facts and information about the situations of women and men in a given operation.

Background

The 3R method was developed by Gertrud Åström and the Swedish Association of Local Authorities. It has primarily been used by local authorities to review and analyse the degree of influence women and men have in the municipal operation, their contact with it and the prevailing norms in it. The 3R method has also been used by other organisations in Sweden and abroad. The method involves developing quantitative data, figures and information, which then provide the basis for a qualitative analysis of the operation.

1R Representation

How many women and how many men?

Heads are to be counted at all levels in the company or organisation: at executive level and staff level and among customers, citizens and users of the goods or services provided. The replies indicate how gender is distributed among those who take the decisions in the operation, those who work in it and those who are exposed to it. Specific questions may include: How many women and men are represented in senior management? How many women and how many men are involved in the development of a new car model? What is the gender division among those we rush to hospital in ambulances with flashing blue lights?

2R Resources

How are the organisation's resources – money, space and time – distributed between women and men?

The answer to this question indicates what women and men respectively get out of the operation concerned. Specific questions may include: How much money does the bank lend women and men respectively? How much time do sales staff spend on women buying a car and on men in the same situation? Which spaces do girls and boys respectively tend to use at day nursery? The idea is to replenish the representation analysis and as far as possible bring in the distribution of resources.

3R Realia

How come representation and resource distribution are divided between the sexes in the way they are?

This question requires analysis and discussion and often the use of outside expertise as well. The answer gives an idea of the normative ways in which women and men are viewed in the organisation and how this affects the operation. Questions may include: Why do our ambulances rush more men than women to hospital with flashing blue lights? Why do we lend women less money than men? Why are girls mostly in the dolls' corner while the boys range more freely about the day nursery? Have the staff encouraged this?

All the Rs are needed

Central to this method is that all three Rs are needed to mainstream gender into an operation. You have to count first – get an idea of the gender divisions that exist. The important thing is to acquire information specifically about one's own operation – the situation may not be quite the same in others of a similar nature. You can then begin discussing why things are the way they are. In this discussion, the current situation is compared with the gender equality goals for the organisation and for society as a whole. On the basis of a concrete discussion of what gender equality means in your particular operation, it becomes clear what needs to be done.

Important

Remember that the review and analysis are to provide a basis for change! There is a danger of getting stuck at the review stage and being unable to move on to the reasons why things are as they are. Without proper analysis, it is not possible to develop a constructive discussion of the changes that will be needed if the operation is to be based on gender equality. For this reason, the review must be given a time frame with clear demarcations.

GERAC (JämKas)

Gender Equality – Review, Analysis, Conclusions

There is much demand for a gender analysis aid or guide of some kind. A number of questions may be of help in compiling this kind of analysis.

Background

A gender analysis aims to show how things stand in the operation concerned. It provides a basis for the setting of specific operational goals concerning gender equality that are in line with the general policy goals. A number of different Swedish and foreign analytical models exist. They are often based on a battery of questions. Some are simple and brief, others more wide-ranging and detailed. SIDA, for instance, has published a series of manuals as aids to gender mainstreaming efforts in a number of its fields of operation.

GERAC (JämKas in Swedish) is a refinement of a simple method for analysing gender equality, developed at the Swedish Government Offices. The 3R method has been woven into it. So too has the model on the opposite page, developed by Statistics Sweden (SCB) to show how a problem and its underlying causes and effects may be illustrated by statistics.

Target groups?

Which target groups are affected by the operation?

In analysing the ways in which an operation is characterised by (in)equality, you first have to determine where people are. So you start by identifying the target groups that the operation is aimed at – customers, users or citizens in general. Who is affected by the activities concerned, who makes use of them and who comes into contact with them, directly or indirectly?

Conditions

What kind of conditions do women and men enjoy in the operation?

Review the question of how women and men are represented in the target groups. How many women and men make use of the activities concerned? Then proceed to review the gender distribution of resources or the extent to which women and men in the target groups have access to them. (See the 3R method.)

Causes

How can any differences in conditions for women and men be explained?

The review (Question 2) has probably revealed a gender pattern. We have found a 'problem' that has to be analysed. It is now a case of trying to understand the pattern/problem and explaining why things are as they are. The problem field needs broadening. Underlying factors that contribute to the pattern and to the effects/consequences of it need to be brought into the open. These can be illustrated by further information and statistics. Utilise the model on the opposite page.

Challenging norms?

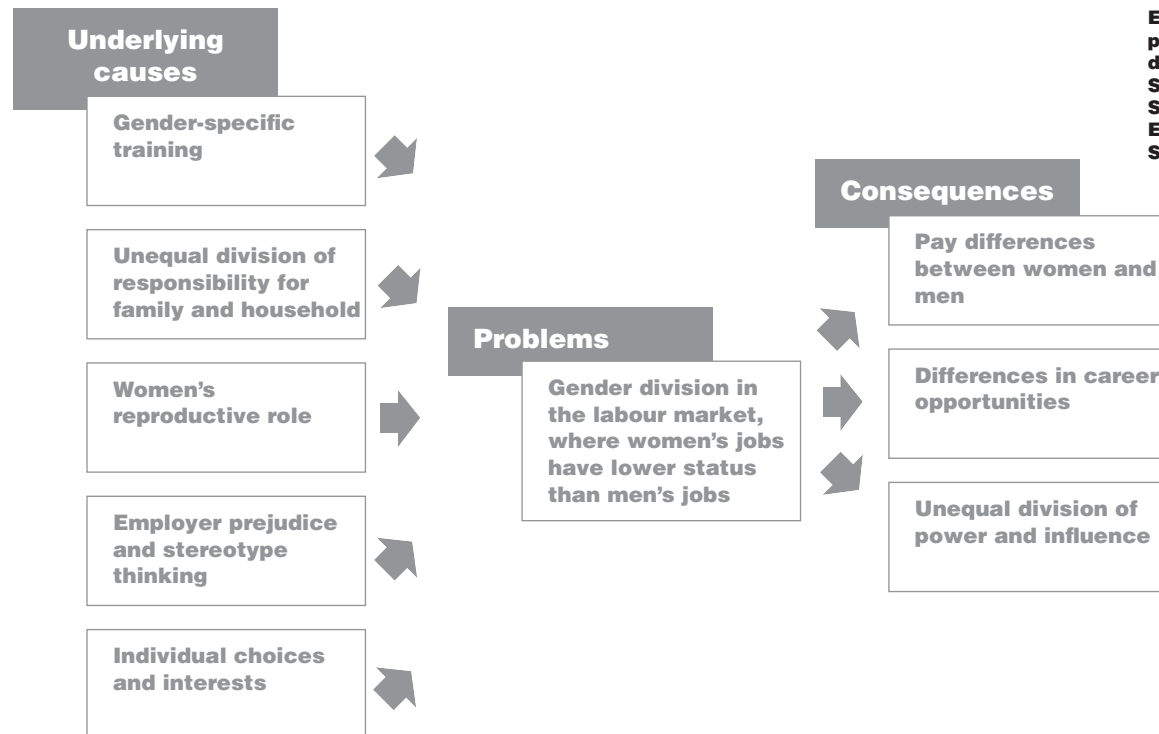
To which gender equality goal or goals does the operation relate? What do the goals say?

Now it's time to challenge the norms! Gender patterns and stereotypes are to be called into question. The analysis is conducted on the basis of the gender equality goals that exist within and/or outside the organisation. Does the operation help to generate the same rights, opportunities and duties for both women and men? Does it respond adequately to the situations, needs and priorities of both sexes?

Propose changes

Proceeding from the goal-based gender analysis, the question to be put here is: What changes can be made to bring gender equality into the operation?

Here, the extent to which your organisation (or section) is able or allowed to do something about the problem must be clarified. There are of course underlying factors that cannot be dealt with directly, but the important thing is to tackle one's 'own problems'. In time, this will also affect both the underlying factors and the consequences. Questions to be asked here are: How are our working methods or procedures to be altered so that different results may be achieved? Are there any special measures we can take that will affect gender equality?



Example of a problem description.
Statistics Sweden (SCB), Engendering Statistics 1966.

About checklists

It's easy to imagine a checklist being of help in verifying gender equality in your everyday work.

“Hello, could someone give me a checklist, please?”

That's not a bad approach.

A checklist can confirm a certain course of action, but it is no substitute for development work or training in gender equality matters. Checklists have been developed and tested. The trouble is, they are not always used. One reason could be that the person who is to use it has probably not been involved in shaping it.

This is why no ready-made checklist will be presented here. Instead, we offer some tips as to how a checklist might be constituted:

- 1 The checklist must relate to the gender equality goals in the operation – this makes the checking easier to grasp.
- 2 Before composing a checklist, ask yourself the following: Why must we check? Who is to do the checking? When is it to occur and must it be reported to someone?
- 3 The checklist must be put together by or in collaboration with the person/persons who will be using it.
- 4 Start with routine procedures and determine how things could be done

differently to help the organisation attain its gender equality goals.

- 5 Decide when and where (in what situations) a checklist might be useful.
- 6 What is to be checked? This of course depends on the type of operation involved, but it might be a good idea to proceed on the basis of the questions contained in a review procedure, such as the 3R method.

Different kinds of operations – different checklists

A number of organisations – among them government agencies and special-interest groups – have tried enclosing a checklist with documents that are to be dealt with by senior management or the board. This is to help management determine whether the gender perspective has been properly included both in the proposals and in the background material submitted for decision.

Useful tip!

When using this kind of checklist it is a good idea to avoid yes/no questions. Instead of asking whether women and men will be affected by the proposal or activity in question (leading to a yes or a no), it is better to ask “In what way will women and men be affected by the proposal/activity?”. Replying to this necessitates analysis and reflection, and results in more information to whoever will be taking the decision. Another type of checklist is the ‘self-examination material’ developed for Swedish schools by the Association of Local Authorities, the Union of Teachers and the National Teachers’ Union (see www.svekom.se). It comprises a number of questions that help teachers become aware of how they relate to girls and boys in the classroom. The idea is that awareness of their own actions will enable them to alter behaviour that reinforces gender inequality.

And finally...

Dealing with resistance

Change can arouse strong feelings. This is not confined to the gender equality aspect, but gender equality can arouse other kinds of feelings and encounter resistance. Dealt with properly, such opposition can be turned into something positive.

What is resistance?

The resistance that gender equality encounters is a protest against a concept but is often expressed as a protest against an individual – the person whose task it is to work for change. So it is important for senior management to make clear both its responsibility in the matter and its commitment, and also to be prepared to respond to criticism. Remember, those who dispute something are not necessarily against it – the questions they ask may help the work forward.

Involving and activating people

People need to be involved in a change process, to be given the chance to express their feelings, to consider the changes and try them out. Experience and research shows that outspoken and unequivocal resistance can be turned into a positive force for change when people find that their objections are treated with respect and that there is scope

for an open discussion. But it is vital to work in a structured way, even when dealing with and discussing feelings, attitudes and opinions.

1. What is to be changed?

Start by explaining what gender mainstreaming involves and what kind of change process senior management has decided to initiate. When people in the organisation have understood what the work will involve and their part in it, questions will be asked and any resistance will become visible. This is a good time to give people in the organisation the opportunity to express their views and positions. Attitude and valuation exercises may be one way of dealing with these issues.

2. Attitude and valuation exercises

Make clear the connection between the valuation exercise and the change process by reminding people why the work has been initiated (goals, assignments, expected

results of the work, etc). Preferably, base the discussion on matters of relevance for the organisation's own operation.

3. Rules of the game

The person who leads the exercise must not act as judge and jury but should show respect for whatever views emerge. It is better to put follow-up questions so that speakers can explain their reasoning.

Results of the attitude and valuation exercises

Quite often, resistance is due to ignorance or prejudice. It may also be a case of senior management's intentions and instructions not being explicit enough. An exercise may lead to a realisation that new information needs to be gathered or that a new mandate is needed from senior management emphasising the importance of pursuing a process of change.



There are various kinds of methods that can be of help in creating structured discussions. These include valuation exercises of various kinds, role games and card games. Bringing in outside expertise may also be worthwhile.

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