

## EFC Gender Equality Network: Initial gender mainstreaming assessment

### About Learning Journeys

#### What are Learning Journeys?

The members of the Gender Equality Network have initiated an assessment called “Learning Journeys” to reflect on and share their experiences in integrating the gender dimension structurally into their organisational policies, practices and culture in the pursuit of greater equality.

This report offers an initial analysis of the experiences and approaches of six funders; C&A Foundation, Foundation CHANEL, Joseph Rowntree Charitable Trust, King Baudouin Foundation, Open Society Foundations, and the Wellcome Trust.

### Methodology

The information for this report was gathered through interviews. The funders involved in the consultation who are undergoing this transformation see this as an exploratory process in which they can experiment with and revise various tools, practices and structures as they learn from these experiences. No organisation considers itself as having achieved complete gender equality. For all funders, this is a work in progress.

### Meaning and value of Learning Journeys

Many funders who are committed to advancing gender equality through their programmes have recently recognised the value of gender equality as an organisational value for themselves. In 2015, the network produced a publication titled “Grantmaking with a Gender Lens: Five Practice Case Studies”. This time, the network members wanted to focus on how practices, procedures, structures and interpersonal relations contribute to the enhancement of gender equality within their own organisations.



#### Diversity and inclusion

A gender lens allows organisations to uncover and consider voices and experiences that may otherwise go unheard. Gender is a starting point of these Learning Journeys and helps unlock other intersecting issues of power and privilege. All case organisations have acknowledged the importance of addressing other forms of power imbalances and inequalities down the road. They have broadened the scope of their attention by focusing on diversity and inclusion.



#### Greater impact

Funders believe that mainstreaming gender both externally and internally makes them better grantmakers and helps them achieve greater impact.

## Motivation and triggering factors

When looking into the motivations and triggers for a journey on gender policy, there were some common themes identified.

### **Need for consistency**

Funders who are committed to enhancing gender equality through their programmes at some point in their organisational evolution recognise the importance of “walking the talk”. While funders may expect grantees to apply gender mainstreaming principles, it is equally important to apply those principles within their own organisations as well.

### **Current context**

The #MeToo movement has enhanced the need within organisations to reflect upon and address gender equality internally.

### **Gender equality advocates**

Gender-sensitive ambassadors play important roles especially in keeping the momentum going. However, commitment of at least one leader seems necessary to initiate the transformation. In all cases, someone in a leadership position brings the issue to the attention of the rest of the leadership. This person may have previous experience in gender mainstreaming or have an awareness and understanding of gender inequalities.

### **Strategic planning in progress**

The first step towards internal gender mainstreaming is usually taken during the strategic planning process. This is a good time for reconsidering connections among organisational vision, values and actions and prioritising what really matters to the organisation. Strategic planning gives the possibility to apply a gender lens across the organisation as it shapes all organisational processes.

## Elements of the change process

### Internal structures for change

Funders have created new structures to coordinate their gender mainstreaming procedures. Following are some examples of “guardian structures” of the change process:



Full-time internal position for gender lens in their work



Department with dedicated staff and budget for gender focus



Volunteer committees within the organisation to raise awareness, hold events and review policy



Champion or representative for gender within an area working

### Resources

#### Dedicated budget



Only one of the case organisations has a dedicated budget for diversity and inclusion efforts over a period of five years. The others must get periodic approval from their board or directors when funding is needed for implementing gender-mainstreaming actions. The funders report that not having a dedicated budget slows down the process.

#### Consultants



While funders may be experts on gender equality, they may lack expertise in organisational learning and development. Organisations often have good intentions but do not know where to start and how to structure the process to make change happen. This is where consultants bring the greatest value to gender mainstreaming. They are able to look at the entire organisation, provide an objective view of the current state of organisational culture and help uncover situations that inhibit gender equality.

#### Conferences



Funders get the biggest inspiration from their peers. Conferences are places where they meet peers, talk about their challenges and discuss how to address them. All funders find the philanthropic community extremely supportive and open to sharing wisdom and knowledge resources. While it is valuable to make connections with other organisations that have undergone a similar change process and exchange experiences, there is also the risk of remaining stuck in their sector bubble. One of the interviewees recommends talking to unusual organisations, groups and individuals to broaden one’s horizons.



## Instruments

### Gender audit □

Conduct a gender audit to understand where the organisation stands and which areas require more attention. After identifying actions for addressing problematic areas and implementing them for a period of time, organisations measure their progress by using the gender audit as baseline data.

### Policy reviews △

Some funders create gender committees, which are responsible for suggesting policy changes and/or reviewing policies drafted by various units in the organisation. The more collaborative a policymaking process is, the higher the chances are that it will be internalised and implemented effectively across the organisation.

### Road map △

The funders usually work with external consultants to develop an action plan. The consultants have one-to-one meetings to understand how staff members operate and make decisions. They organise a series of meetings, in some cases with all staff members and in other cases with the representative of gender committees, to discuss and plan for changes that can be made on internal policies, procedures, practices and structures. From those interactions, consultants are able to create a suggested list of actions. Then, it is up to boards whether and how to prioritise these recommendations and integrate them into their organisational plans.

### HR policies □△

Policy changes are manifold and vary from organisation to organisation. Most of the efforts focus on HR policies. Funders undergoing gender mainstreaming pay more attention to their recruitment processes. They are changing the way they announce vacancies, reach out to target groups, and interview and assess candidates in order to avoid unconscious biases and promote diversity in the workforce. Reflecting stereotypical role assignments, women are often a majority of a foundation's staff but are clearly underrepresented in leadership positions. The funders make deliberate efforts to have more women in board and management roles, however they add that this is an area that is harder to change. Anti-bullying and harassment policies, flexible working possibilities, parental leave and equal pay emerge as other policies and practices that help to enhance gender equality in the workplace.

### Training courses & workshops ○

The funders are aware that internal stakeholders do not all have the same level of awareness and knowledge about gender mainstreaming. Therefore, it is important to provide all staff members with fundamental information about gender equality. This may be in the form of trainings or workshops facilitated by external gender experts. The focus of these capacity development activities is not only to enhance staff members' knowledge but also to encourage them to face their own biases.

# DIVERSITY, EQUALITY AND INCLUSION LEARNING JOURNEYS

- MEASUREMENT
- CAPACITY
- △ POLICY & CULTURE

## Introducing new rules △

One of the funders has developed policies to ensure equal participation of men and women in meetings. They use participatory methods to involve everyone in the discussion and make sure that all voices are heard, which leads to staff members feeling more enabled to speak up in the meetings and express their ideas. They organise panels with equal representation and refuse to speak at all-male panels.

## Adapting tools ○△

Funders adapt their existing tools or create new ones to guide their staff members in applying a gender lens to their work. One of the funders created a checklist to ensure that staff members ask the right questions and take into consideration all important points when making decisions. This funder has also produced case studies to give examples of challenging situations in applying a gender lens and to explain how these challenges can be tackled. Staff members are trained in using checklists and other tools, which are made available to everyone in the organisation through the intranet. Another funder has incorporated gender sensitive questions in the needs assessment section of the grant application. This enables them to understand the needs of the field from a gender perspective.

## Self-reflection & feedback □○△

Reflection is an important part of the Learning Journey. In one case, the consultants worked with programme staff of two selected portfolios over several months and analysed how they were making grants. The staff members were asked to critically reflect about the way they were applying a gender lens, instead of waiting for consultants to tell them the correct way to do it. At the end of the year, the organisation organised a large meeting to assess all these findings together and to discuss next steps. Showing progress and success also helps funders to deal with internal scepticism. Moreover, the funders find it helpful to receive feedback from external stakeholders about their progress. Some of them form advisory committees composed of experts, scholars, and activists to look at their progress report and give honest feedback.

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## Challenges

Through the process of implementing the policies and instruments outlined in this report, the funders are finding that gender mainstreaming is an evolutionary and iterative process, allowing for improvement over time as they gain experience. On this journey they are confronting several challenges and trying to identify ways of addressing them.

**RELATED  
RECOMMENDATIONS**  
(see next page)

### Structuring the process

Most of the time, the funders are willing to become more gender sensitive but do not know how to start the process. They do not have a clear idea about what the transformation entails, how much time it requires, and what resources are necessary.

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### Prioritisation

The actions listed in the road map are sometimes too exhaustive. It is ambitious and unrealistic to aim for achieving all these changes at the same. Which actions are more important and urgent than the others can be a topic of debate. Moreover, the focus of attention can easily shift from internal practices to external relations.

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### Fluctuating commitment

Funders believe that staff members' motivation and commitment to apply a gender lens to their work fluctuates because it is not part of their job description, and their performance is not assessed based on the extent to which they contribute to the gender mainstreaming process. Once the policies are written, people sometimes think that the job is done.

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### Shifting mentalities

It is relatively easy to change policies and procedures. The real challenge comes with implementation. New policies do not bring much change unless people in the organisation are willing to alter their practices. It may not be that people are resistant to change, but rather that they are often not aware of their biases which prevent them from applying a gender lens to their work. One of the funders stresses that having numerical equality does not necessarily involve the employment of a gender lens. Striving for a mentality shift is therefore equally important.

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### Transparency

By conducting a gender audit, funders are assessing and disclosing where they stand in terms of internal gender mainstreaming. However, some important indicators of gender mainstreaming cannot be measured because information, such as salaries, is considered confidential by the HR and legal departments.

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## Recommendations

Based on their experiences and learnings, the funders recommend that their peers consider the following points:

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Commitment of leadership



Having buy-in from board members makes it easier to overcome the barriers to change. The gender champions should support leadership in increasing their awareness about gender equality. One of the funders uses reverse mentoring where members of diversity groups mentor organisational leaders to help them understand the kind of challenges they face at the workplace and what actions can be taken.

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- 2

Develop a strategy



Organisations that started the process with a lack of coherence and concrete strategy feel that they should have done more analysis before jumping into one-off activities. Organisations should first understand where they are in gender equality, define the problems and identify areas of intervention. This should inform the strategy. Then they should resource that strategy. Changing organisational culture should go hand-in-hand with revising templates and procedures.

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- 3

Allocate resources



Organisations should set up structures such as an inclusion and diversity unit. People's time to coordinate this work should be recognised and included in their official job descriptions. In addition to financial resources, technical resources should be available to support staff members' learning process.

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Bring in experts



Experts should point out the situations in which organisational members are not really applying a gender lens when making a decision. Hence, people will be more aware of their own actions and the consequences of those actions. Working with a consultant, in that sense, can help the organisation face internal power and privilege issues.

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Share responsibility



Gender mainstreaming should not be seen as the responsibility of one person or a small group. It is important to ensure commitment across the organisation. Power and privilege, along with gender equality, should always be on the agenda in order to maintain the commitment to change. Organisations should regularly take time to reflect about changes. People should be aware that this is a long process and it requires everyone's commitment. There should be a shared understanding about what the transformation entails and why it is important. The performance measurement should involve metrics about both the staff's and the leadership's contribution to gender mainstreaming.

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Focus on intersectionality



In addition to gender, a person's class, race, religion and ethnicity all have an effect on their experience and social position. Funders should be aware of how these various and intersecting aspects of a person's identity can impact the opportunities available to them, and how they perceive these opportunities.

## Is your organisation ready for a Learning Journey?

The EFC Gender Equality Network invites any EFC member interested in setting off on a gender mainstreaming learning journey to join the growing group of organisations engaged in this process. If you would like to know how to get started, or just to learn more, do not hesitate to get in touch with the EFC Gender Equality Network (see contact details below).

### About the EFC Gender Equality Network

The EFC gender equality network aims to promote synergies among its members and serves as a knowledge hub for EFC members working towards gender equality. The network also aims to give deeper insight into what gender equality means and why it is relevant for foundations to include a gender perspective throughout their work. The gender equality network steering committee is composed of Barrow Cadbury Trust, Fondation Chanel, King Baudouin Foundation, Mama Cash, Open Society Foundations and Sabanci Foundation.

[www.efc.be/thematic-networks/gender-equality](http://www.efc.be/thematic-networks/gender-equality)

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### About the EFC

As a leading platform for philanthropy in Europe, the EFC works to strengthen the sector and make the case for institutional philanthropy as a formidable means of effecting change.

We believe institutional philanthropy has a unique, crucial and timely role to play in meeting the critical challenges societies face. More people and causes benefit from institutional philanthropy than ever before, from eradicating deadly diseases and making the world's populations healthier to combating climate change and fighting for global human rights and equality.

Working closely with our members, a dynamic network of strategically-minded philanthropic organisations from more than 30 countries, we:

- **Foster peer-learning** by surfacing the expertise and experience embedded in the sector
- **Enhance collaboration** by connecting people for inspiration and joint action
- **Represent philanthropy** for favourable policy and regulatory environments
- **Build a solid evidence** base through knowledge and intelligence
- **Raise the visibility** of philanthropy's value and impact

For more information, visit the EFC website and download the EFC Strategic Framework 2016-2022, developed by the EFC membership.

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