

# Institutional Transformation

## Checklist: Key questions for an organisational change

In accordance with the Guide's steps for introducing gender mainstreaming, key questions for the organisational change are:

### Preparation stage

- Creating accountability and strengthening commitment**
  - Is promoting gender equality part of the organisation's general mandate?
  - Does the organisation have an official statement on their goal for gender equality and their strategy for pursuing gender mainstreaming?
  - Is gender mainstreaming integrated in the regulations of the organisation and in both the formal and informal standard operating procedures?
  - Do the executive staff demonstrate their commitment to gender equality and the implementation of gender mainstreaming, in both formal and informal ways?
  - Do the executive staff exercise their responsibility for the implementation of gender mainstreaming, both by strengthening the commitment of all staff members and by adopting a gender equality perspective in their regular decision-making?
  
- Allocating resources**

- Are the financial resources allocated for introducing gender mainstreaming and implementing organisational change realistically calculated and sufficient in order to ensure long term success?
- Has the amount of working time that staff members are to spend on the process of change been realistically calculated? Is it transparent and is it acknowledged as being a valuable part of the regular job?
- Is the assignment of new tasks to the gender equality staff accompanied by a corresponding increase in working time available for this purpose?
  
- Conducting an organisational analysis**
  - Which approach of organisational analysis (e.g. gender audit) and which methods are to be applied?
  - Who is to conduct or facilitate the organisational analysis? Do the persons assigned to this task have the expertise and methodological skills needed?
  - Are the results comprehensive and instructive in order to identify the most promising way to implement gender mainstreaming with regard to the particular organisation? Which information is still missing?
  - Are the results to be discussed with all stakeholders? Who is responsible for ensuring that appropriate consequences are drawn from these results and that these are utilised?
  
- Developing a gender mainstreaming strategy and a working plan**
  - Is all the information available that is needed in order to develop a suitable gender mainstreaming strategy?
  - Who is involved in developing the gender mainstreaming strategy? Do the persons involved have the expertise needed in order to develop a sustainable strategy?

- Is the gender mainstreaming strategy comprehensive and complete in terms of the steps for introducing gender mainstreaming?
- Is the working plan for implementing the gender mainstreaming strategy complete in terms of planned activities, defined milestones, responsibilities, allocated resources and deadlines?
- Who is responsible for implementing the working plan and monitoring the introduction of the gender mainstreaming strategy?

## Implementation stage

- Establishing a gender mainstreaming support structure**
  - Are the gender mainstreaming support structure's role, tasks and its integration in the organisation's standard procedures clearly defined?
  - Is the precise organisational form of the gender mainstreaming support structure and its position within the organisation in accordance with the role and tasks that it is to fulfil?
  - Are the resources and competencies (qualifications, time and financial resources, authority) of the support structure adjusted to suit the defined tasks?
  - Is the support structure's role clearly communicated to the staff together with the respective responsibilities of all staff members in order to avoid that responsibility for implementing gender mainstreaming is left with the support structure?
  - Does the support structure have both a direct link to the senior management as well as a good connection to the operative staff?

Gender information management system

**Setting gender equality objectives**

Does the organisation have stated gender equality goals both for the organisation as a whole and for its different spheres of activity?

Are these goals both ambitious and realistic as well as defined in a precise way so that they can be the driving force behind action and provide staff members with clear guidance?

Are the organisation's gender equality goals firmly anchored within its general target architecture?

Are these goals clearly communicated with the members of staff?

How is the attainment of these goals to be monitored and evaluated? Have indicators been defined for this purpose?

**Communicating gender mainstreaming**

Are all staff members aware of the intended process of organisational change? Have they been informed about the planned activities, the reasons behind these and the aims of this process?

Is transparency ensured during the entire process of introducing gender mainstreaming?

Are both formal and informal channels used within the organisation to communicate the objectives and requirements of implementing gender mainstreaming?

Is gender equality a visible part of the organisation's external identity and self-portrayal?

Is the organisation's public relations work gender-sensitive in terms of language and illustrations? Are staff members who are responsible for public relations work trained in gender-sensitive language and avoiding gender stereotypes?

**Introducing gender mainstreaming methods and tools**

Does the organisation have gender mainstreaming methods and tools for all stages of routine procedures?

Are the gender mainstreaming methods and tools custom-made and suitable with respect to the functionality and regular procedures of the organisation? Have the tools been tested and adapted?

Are the gender mainstreaming tools being systematically and continuously applied?

Do the staff members who are to apply the tools have the gender knowledge and methodological skills needed for the well-substantiated implementation of gender mainstreaming?

**Developing gender equality competence**

Are all staff members performing their respective tasks and following the rules of procedures in order to effectively implement gender mainstreaming?

Are the human resources management tools that are typically used within the organisation also being used to strengthen commitment and create accountability for gender mainstreaming?

Do all staff members have the gender expertise and the methodological skills they need to fulfil their responsibility for implementing gender mainstreaming?

- Do all staff members have the gender expertise and the methodological skills they need to fulfil their responsibility for implementing gender mainstreaming?
- Are the activities for developing gender equality competence fully integrated into a coherent gender mainstreaming strategy and are they approached in a systematic manner?

**Establishing a gender information management system**

- Is comprehensive yet tailor-made information on gender issues relevant to the organisation's policy areas and fields of activity available and easily accessible for all staff members?
- Are relevant materials on gender issues provided in a clearly structured manner? Are these materials actively distributed amongst staff members?
- Are all statistics that are produced or used by the organisation disaggregated by sex and – where suitable – by further categories (e.g. age, ethnicity, disability etc.)?
- Is the gender information management system supplemented and updated on a regular basis?

**Launching gender equality action plans**

- Do all units of the organisation have gender equality action plans?
- Do the gender equality action plans include a well-substantiated and comprehensive gender analysis of the respective field of activity, defined gender equality objectives, a clearly stated approach to addressing gender issues as well as indicators for monitoring?
- Who is responsible for realising and monitoring the gender equality action plans?

- Is there a fixed date set for evaluating implementation and target achievement?
  
- Promoting equal opportunities within the organisation's personnel
  - Are measures being implemented to improve the gender-balance in staffing patterns and to increase the representation of women in decision-making positions?
  - Have recruitment procedures and performance appraisal criteria been revised? Have tools for job evaluation been introduced that are free from gender bias?
  - Is the organisation engaged in reconciling the balance of work and family life for its staff members?
  - Does the organisational culture provide a respectful and empowering atmosphere in the workplace? Does the organisation have clear procedures for preventing and dealing with sexual harassment in the workplace?

## Evaluation stage

- Monitoring and steering organisational change
  - How is the process of organisational change towards gender mainstreaming steered and the progress made monitored?
  - Is the working plan updated on a regular basis?
  - Is the gender mainstreaming strategy reviewed at regular intervals and adapted if necessary?

- Who is responsible for monitoring and steering the introduction of gender mainstreaming?