Gender Equality and Social Inclusion (GESI) Self-Assessment Tool for Projects Guidance Document

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This document introduces a tool developed by the Girls' Education Challenge (GEC) that is used by projects twice a year. It describes how the tool can be used, shares some lessons learned and adaptations made by projects as a result of completing this exercise.

Objective of the GESI tool as part of the monitoring cycle

To provide a GESI framework that helps practitioners identify any areas for improvement and adapt these to become more GESI Transformative. Transformative activities are more likely to deliver sustainable change in education equality and the lives of project beneficiaries as well as those girls that follow.

The tool was designed to assess whether high level GESI ambitions were being delivered at activity level. It can be used by any project working on any thematic area.

The process is intended to stimulate and support discussion across the project team and with partners. It should not be a template that is completed in isolation. The process encourages honest reflection of activities against a GESI scale, striving for improved project delivery and greater gender equality and social inclusion outcomes. Completing it is not exact science, it relies on projects' willingness to be open about areas for adaptation.

It is recommended to conduct a GESI self-assessment on a 6-monthly cycle.

A note on terminology

- 'Data disaggregation' refers to the analysis of data at sub-group level.
- 'Sub-groups' refer to groupings of people through self-identified or project-identified characteristics e.g. ethnic groups, child brides, child labourers, young mothers and children with disabilities.
- 'Gender Equality' means that girls/ boys and women/men have equal conditions for realising their full human rights and for contributing to, and benefiting from, economic, social, cultural and political development. Gender equality is the equal valuing by society of the similarities and the differences of men and women, and the roles they play.
- 'Social Inclusion' refers to approaches which recognise the importance of providing opportunities to ensure all members of a community are included in an activity irrespective of their ethnicity, language, disability, religion, sexual orientation, for example. This is not an exhaustive list, as different contexts will have a wide range of social identities, which will have their own history and dimensions of exclusion.

The terminology in the following continuum helps provide a common language to describe how activities are delivering on GESI intentions, how they may fall short of their ambition, and why.

Not GESI Sensitive	**GESI Absent**	Gender norms and unequal power relations or potential patterns of social inclusion are not considered in the design or delivery of activities. There is no disaggregated data by sex, disability or other social characteristics or groupings. There is no discussion of the gendered dimensions or social exclusions of the environment they may be operating in and how this may affect project interventions.
	GESI Exploitative	This approach reinforces and/or takes advantage of inequitable gender norms and/or social inequalities and stereotypes. This includes, for example, expecting mothers to volunteer at school to support project initiatives without compensation or direct benefit to themselves. Involvement in these activities exploits women's unpaid labour and could deepen their economic vulnerability.
	GESI Unresponsive	Gender norms and social inequalities are acknowledged as key aspects of context but not brought into any aspects of planning, delivery or feedback.
GESI Sensitive	**GESI Accommodating**	Acknowledges but works around gender, disability or other social differences and inequalities to achieve project objectives. Activities will address the practical needs of girls but will not address the underlying inequalities that would address unequal gender norms or roots of exclusion. This can be seen as a "missed opportunity" to begin to shift norms. However, they are often a critical first step towards gender equality and social inclusion transformation.
	GESI Transformative	Actively engaging with and transforming gender and social inequalities to achieve sustainable change, gender equality and reverse social exclusion. Gender stereotypes and discriminatory norms are challenged, and the project seeks to transform unequal power relations between social groups, boys and girls, men and women through changes in roles, status and the redistribution of resources.

Who should be part of the self-assessment tool exercise?

This exercise is best completed by technical and delivery teams in the location of the project, and with downstream partners if appropriate. This exercise should include someone with GESI expertise to help guide the discussion or unpack technical queries when thinking about gender and inclusion. It is a good opportunity to invite downstream partners to the discussion as it can help create a shared vision of the GESI ambition for the project.

A 'moderator/critical friend' should be invited to review the initial assessment provided by the project team. This should be an external actor with GESI expertise, who has direct experience of this project's implementation over the past 6 months (i.e. independent monitor/ donor/ specialist partner).

Allow at least 2 hours for each session. This may become quicker as users become more familiar with the categories and process.

How to use this tool

1. Ensure that the team gathered are familiar with the purpose of the exercise and the GESI continuum categories against which you will be judging your activities.

2. The discussion will be structured around the output level of the logframe, focussing on the activities that have been delivered in the last 6 months. Discuss which GESI rating the group believe the activities under each output match. Ask for examples to justify these ratings. Assess the gender and social inclusion dimensions of these activities separately – they may fit different categories on the continuum.

3. In instances where several activities occur under one output, select examples of where activities have the opportunity to be more GESI transformative. Record highlights of the activities to justify your scoring for each output. This should result in just one rating per output for Gender Equality and Social inclusion (see final ratings chart below). The spirit of this tool is to recognise where delivery could be improved rather than only showcasing the best examples.

4. For any activities that are not GESI transformative, add notes to the Proposed Adaptation box on how you plan to improve these activities with a stated timeline.

5. Capture if there are external factors that have constrained or influenced this rating in the additional comments section.

6. Share your tool summary with the 'moderator/critical friend'. Host a second meeting with key members of the first event and the 'moderator/critical friend'. The purpose of this event is to invite the moderator to explore ratings given by the project and share examples from their own visits to the project activities to confirm or challenge where they feel ratings may not be in the correct place and provide examples of how to raise the aspirations.

7. Any project adjustment to ratings and adaptations that are generated through this moderation exercise should be agreed and followed up with relevant colleagues (finance, project manager, delivery partners, donor).

ALTERNATIVE METHOD: If you feel the dynamic of an external actor will not constrain the freedom and honesty of the initial discussion across teams, you can host this self-assessment exercise as a single event and the moderator/critical friend can perform this role within these discussions.

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Project name	
Date completed	
Names of contributors	

Output *Fill in the column below Add/delete rows as necessary*		GESI Absent	GESI exploitative	GESI Unresponsive	GESI accommodating	GESI Transformative	Additional comments	Proposed adaptation
Output 1:	Gender							
	Social Inclusion							
Output 2:	Gender							
	Social Inclusion							
Output 3:	Gender							
	Social Inclusion							
Output 4:	Gender							
	Social Inclusion							
Output 5:	Gender							
	Social Inclusion							

Final ratings:

(add rows as needed)	Gender rating	Social Inclusion rating
Output 1		
Output 2		
Output 3		
Output 4		
Output 5		
Output 6		

Lessons learned when using the GESI tool

- **The greater variety of team members, the richer the discussion.** This is a great opportunity for raising gender and inclusion capacity for all team members and partners and creating a common vision for what the project is hoping to achieve on GESI.
- **Having GESI expertise within the group is vital** to help guide the conversations, dig further into assumptions or the content of messages and challenge whether activities are truly transformative.
- **Keep the discussion grounded in actual activities that have happened in the last 6 months.** Input from field staff in the discussion is vital to share what is actually happening on the ground, as the discussion can easily revert to 'aspirational' language that sounds more like a project proposal.
- **Do not try and complete an electronic version of the tool form during the discussion -** this constrains the freedom of the discussion and can end up feeling like a collective editing exercise. Facilitation should focus on the discussion, keeping note taking fairly light touch, completing the tool after the event.
- **The moderator / critical friend should have visited the field operations in the last 6 months.** Evidence and analysis from these trips provide the data which can challenge assumptions that HQ project teams may make about how GESI sensitive the interventions are in reality.
- **Repeat this exercise approximately every 6 months.** It will provide a regular space to keep staff and partners focussed on opportunities for their practise to be as effective and GESI transformative as possible.
- **Early use of the tool may generate fairly complementary scores.** The more the tool is used the more honest and self-critical users may be as they recognise the value of highlighting opportunities for project adaptation to be more GESI transformative, rather than it being an opportunity to showcase good practise.
- **Aim not to leave activities in the accommodating category for too many iterations of the tool exercise.** Keep trying to identify opportunities to challenge gender norms and the root causes of social exclusion that could make activities potentially transformative and have longer lasting impact, rather than be satisfied that activities can stay at the accommodating level.
- **Ensure that the team can draw on the projects' social inclusion analysis, or beneficiary selection logic.** Without this content the social inclusion discussion may be fairly shallow, as the team will not be able to tune in to specific subgroups the project may be designed to support. If these discussions are not generating varied or deep analysis it may be helpful to conduct some social inclusion training so staff are able to provide more nuance during the GESI self-assessment discussion. Social inclusion analysis needs an intentional approach to seek out those who are excluded. The dynamic of exclusion is that we may not see who we are not including.
- **Be careful that one dimension of inclusion does not mask others.** If the project has a particular emphasis on one group at risk of exclusion, people with disabilities for example, this can limit the range of discussion under this heading as the group just focusses on one dimension at the exclusion of all others.

Examples of adaptations

The GEC projects are individually designed, complex, multi-sectoral interventions. The examples below highlight where one particular aspect of a project design was thoughtfully considered through a GESI lens and adaptations to the activities were designed to work towards being more GESI transformative. Some of these may have required budget amendments.

GENDER
- Community health volunteers will be engaging fathers in discussions on girls' education where this has been culturally the responsibility of mothers. Attention will be given to the content and the delivery of the message, to engage fathers in parenting responsibilities and positive masculinities rather than reinforcing their role as the 'head of household'.
- Reviewing bursary allocation processes. Feedback from parents' groups has resulted in the project providing broader opportunities to allow for vulnerable boys as well as girls to be able to access school fee loans.
- Reviewing of Teaching & Learning materials to improve content to be more gender sensitive, challenging gender norms where appropriate.
- Participation and representation of women on community structures will be reviewed.
- Actively engaging male teachers and boys in schools in the conversation around menstruation to 'break the silence' over this topic.
- Introducing a new element to lesson observation tools to monitor teachers' sensitivity to gender and how well they include girls in class. These will be completed by fellow teachers and discussed in sessions which support teachers to give peer guidance and advice.

SOCIAL INCLUSION
- Designing an inclusive education strategy to improve support for children with disabilities attending the project schools. The project has connected with a local disability organisation to provide feedback on the strategy and is exploring a longer-term partnership.
- Developing a teaching resource for adapting teaching methodologies to be appropriate for varied learning needs.
- Guidance and counselling manual for teachers on post school pathways will include considerations of inequalities brought about by academic competencies, ethnic backgrounds, disabilities and social- cultural variations.
- Looking at inclusive data collected through monitoring and evaluation to analyse barriers and unique learning needs of teen mothers and children with disabilities.
- Finalising a disability inclusion strategy which includes staff training, parent and community engagement and capacity building of school management and child protection mechanisms. The project will be working with all stakeholders to challenge discriminatory norms faced by children with disabilities.
- Training education officials at all levels on different types of disability to improve their understanding and support for children with special needs and inclusive education.