



**USAID**  
DEL PUEBLO DE LOS ESTADOS  
UNIDOS DE AMÉRICA

# CSA'S GENDER AND INCLUSION MAINSTREAMING IN CIVIL SOCIETY

THE EXPERIENCE OF  
USAID MEXICO'S CIVIL SOCIETY ACTIVITY

A Technical Document on the Strengthening of Civil  
Society in Mexico

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This white paper is part of a collection of strategic documents developed by the Civil Society Activity, implemented by Social Impact, Inc. and financed by the United States Agency for International Development (USAID). The texts that comprise the collection describe the systemic capacity development approach and methodology that the Civil Society Activity designed to accompany more than forty civil society organizations in institutional strengthening, grants management, and legal compliance. In particular, this document describes the various strategies that the Activity designed and implemented to integrate a gender and inclusion perspective in its capacity development processes. The full compendium is a useful resource for strengthening civil society organizations. You may reference the complete collection at Social Impact's website, <https://socialimpact.com/>.

## ABOUT USAID MEXICO CIVIL SOCIETY ACTIVITY

Civil Society Activity (CSA) Mexico was a 4-year program funded by the U.S. Agency for International Development (USAID). CSA aimed to improve the sustainability of Civil Society Organizations (CSOs) to effectively implement their agendas on violence prevention, human rights protection and justice reform in Mexico. To this end, CSA focused on improving CSOs capacity to communicate and work collaboratively, increasing their connections with key stakeholders, strengthening their capacity to develop strategies in response to their changing environment and to their communities' needs and priorities, as well as improving CSOs access to knowledge and resources. The USAID Mexico Civil Society Activity was implemented by Social Impact (SI) Inc., in partnership with Fundación Appleaseed.

## ABOUT SOCIAL IMPACT

Social Impact (SI) is a management consulting firm that provides monitoring, evaluation, strategic planning, performance management and capacity building services to advance development effectiveness. SI's work helps to reduce poverty, improve health and education, promote peace and democratic governance, foster economic growth, and protect the environment. To achieve this, SI delivers consulting, technical assistance, and training services to government agencies, nongovernmental organizations, and foundations.

## ACKNOWLEDGMENTS

*Institutional Strengthening with a Gender and Inclusion Perspective in Civil Society Organizations. The experience of USAID CSA* was a collaborative effort drawing on the experience and knowledge of numerous USAID, Social Impact, CSA Mexico staff, and CSA's partner organizations. Special thanks to Elizabeth Warfield and Lucila Serrano, whose contributions to the strategic vision of this Program are reflected on this document, as well as to Gladys Rivera for her valuable advice. Additional thanks go to CSA's Capacity Development team: Anne Largaespada, Brandon Melecio Fischer, María Huerta, Andrea Sanfeliz y Jessali Zarazua for their support, collaboration, and teamwork inspiration.

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## ACRONYMS AND ABBREVIATIONS

G+I	Gender and Inclusion
5 R'S	USAID's methodology for mapping local systems (Roles, Results, Rules, Resources, Relationships)
AMELP	Activity Monitoring, Evaluation and Learning Plan
APS	Annual Program Statement
CD 2.0	Capacity 2.0
CDCS	Country Development Cooperation Strategy
CLA	Collaborating, Learning, and Adapting
CSA	Civil Society Activity
CSO	Civil Society Organization
HICD	Human and Institutional Capacity Development
ISO	Intermediate Support Organization
SP	Solution Package
NUPAS	Non-U.S. Organization Pre-Award Survey
OCA	Organizational Capacity Assessment
OPI	Organizational Performance Index
SI	Social Impact
SNA	Social Network Analysis
USAID	United States Agency for International Development

## EXECUTIVE SUMMARY

This document describes the Civil Society Activity's experience and lessons learned upon implementing several activities and methodologies aimed at including a gender and inclusion<sup>1</sup> perspective in the Activity's capacity development work with allied civil society organizations (CSOs). The document first identifies three strategies that were designed and implemented to ensure that the capacity development of the CSOs featured a gender and inclusion perspective, and subsequently describes the level of interest and receptiveness among partner CSOs, pointing out specific areas of reticence.

The strategies that the Activity utilized in its capacity development work with partner CSOs responded to the findings of an organizational assessment that informed a range of strengthening interventions and technical support to attend to priority areas of opportunity. These strategies drew upon the contents of the Gender and Inclusion solution package and were also mainstreamed into other organizational development activities. In terms of their performance in their external environment, CSOs were advised to develop and implement a monitoring and evaluation plan that incorporated gender and inclusion indicators for their technical projects supported by data that is disaggregated by sex and age.

## II. INTRODUCTION

### ABOUT USAID MEXICO'S CIVIL SOCIETY ACTIVITY

USAID/Mexico designed the Civil Society Activity (CSA) to improve institutional capacities and increase the sustainability of civil society organizations (CSOs) in Mexico so they can more effectively implement their agendas related to crime and violence prevention, legal justice reform, and human rights. CSA supports three of USAID/Mexico's Development Objectives: DO 1 on crime and violence prevention; DO 2 on access to justice; and DO 3 on human rights. CSA's partner organizations implemented their social agendas and interventions in a context where severe human rights violations prevail in which violence towards women and vulnerable populations is an ongoing issue that demands urgent attention. To understand the gravity of the situation, it is important to consider trends in gender-based violence and the general situation of women in Mexico<sup>2</sup>:

Despite specific recommendations provided by the United Nations in 2012 to address the high levels of violence in Mexico, violence in the country continues, affecting the most vulnerable populations most. In fact, violence against women has risen in the last few years. The most severe expression of violence against women is attributed to gender-based homicide, or femicide. This type of violence affects women of all ages, regardless of their social, economic, or cultural status. Feminist movements, civil society, the university, government agencies, and specific actors within the justice and legislative systems have led efforts to raise awareness around femicide and to categorize femicide as a specific crime, but have faced a long and complicated path. A justice reform published in 2012 in Mexico's Official Journal of the Federation sought to include femicide as a crime in the Federal Criminal Code (Article 325). In addition, a 2015 declaration by the Mexican Supreme Court (from here on: SCJN, which stands for "Suprema Corte de Justicia de la Nación" in Spanish) stated that

<sup>1</sup> In this document, "gender and inclusion perspective" refers to approaches that are strategically oriented towards attending to diverse populations in an equitable way, including men and women; differently abled individuals; the lesbian, gay, transgender/transsexual, queer and intersex (LGBTQI) community; socioeconomically diverse groups; and indigenous peoples, among others.

<sup>2</sup> Comisión Nacional de Derechos Humanos, CNDH (2018) "Informe que presenta la CNDH al Comité de Expertas de la CEDAW sobre la situación de las mujeres en México"  
<https://www.cndh.org.mx/sites/default/files/doc/Informes/Especiales/Informe-resum-CEDAW-2018.pdf>

every violent death of a woman must be investigated with the suspicion of femicide. In 2017, backing this declaration, the National Council for Public Safety (from here on: CNSP, which stands for “Consejo Nacional de Seguridad Pública” in Spanish) established the Acuerdo 04/XLII/2017, an agreement that authorized the creation of a platform to gather reports and analyze crimes against victims of gender-based violence. As a result, the Executive Office of the National System for Public Safety (from here on: SESNSP, which stands for “Secretariado Ejecutivo del Sistema Nacional de Seguridad Pública” in Spanish) publishes a monthly report noting every malicious, gender-based homicide, or femicide, so that violence against women can be measured and monitored more precisely.

Currently, the SESNSP publishes monthly statistics of violence against women. Recent data from the SESNSP states that the number of violent deaths of women increased in the first trimester of 2020 compared to the same period in 2019. Although femicides decreased in 2.1%, malicious murders increased by 11.7%.<sup>3</sup> Data provided from the SESNSP suggests that at least 320 women were murdered in January 2020, amounting to roughly 10 cases per day. This figure is comparable to the daily average of femicides that took place in 2019.

Furthermore, the gender gap in employment in Mexico is still wide. In 2017, a reported 43.13 percent of women participated in economic activity compared to 79.33 percent of men (according to data from INEGI–Mexican Institute of Statistics and Geography). INEGI’s data also reveals that women are the largest segment of the population to receive a low income (up to a single minimum wage). The number of women in the workforce decreases dramatically as the level of income rises. When considering positions that receive the equivalent of more than five minimum wages, 894,288 women are employed compared to 2,073,061 men. Moreover, as the 2016 National Survey on the Dynamics of the Relationships at Home (from here on: ENDIREH, which stands for “Encuesta Nacional sobre la Dinámica de las Relaciones en los Hogares” in Spanish) demonstrates, 26.6% of women who have held formal employment have been victims of work-related violence. 47.9% of aggression and violence against women in the workplace were sex-related, according to the survey. In addition, 21.9% of women have reported experiencing discrimination at work. Discriminatory practices include: having less opportunities to receive a promotion in comparison to male colleagues (10.3%), receiving less employment benefits than male colleagues in the same position (5.7%), and being asked to present a pregnancy test as a job requirement (5.3%).

Politics is another area in which inequality, discrimination and gender-based violence have been reported. Several international organizations have recognized that participating in the decision-making process in public affairs is a fundamental right for women. Towards this end, there is an active struggle to include more women in public office. Results from the 2015 and 2016 federal elections show that 38.2% of senators were women, while 42.6% of representatives of the Cámara de Diputados were congresswomen. Women’s participation in five state congresses exceeded 50% of their members: Chiapas (60%); Campeche (54.2%); Zacatecas (53.3%); Querétaro (52%), and Chihuahua (51.5%). However, 84.37% of Mexico’s states have yet to reach 50% of women’s participation. 40% of the states of Mexico still have under 40% of women’s representation in Congress, while the state of Morelos is in last place, barely reaching 20%.

The Civil Society Activity’s Theory of Change holds that civil society organizations (CSOs) participate in local systems that influence their own internal development just as much as CSOs’ internal factors influence the broader system. For this reason, CSA has developed a systemic

<sup>3</sup> Instituto Nacional de las Mujeres, *Violencia contra las mujeres. Indicadores básicos en tiempos de pandemia*. Government of Mexico, <https://www.gob.mx/inmujeres/documentos/violencia-contra-las-mujeres-indicadores-en-tiempos-de-pandemia>

approach that incorporates Human and Institutional Capacity Development (HICD)<sup>4</sup>, Capacity Development 2.0<sup>5</sup> and the Local Systems approach<sup>6</sup>, which effectively strengthens organizations' internal capacities, their performance in their environment, and their systemic impact.<sup>7</sup>

Based in this systemic approach, the Activity designed and implemented capacity development processes through which CSOs, coalitions, networks and *influencers*<sup>8</sup> were able to increase their awareness and knowledge about their environment, and identify the changes they wished to produce. Moreover, the Activity supported organizations in strengthening their internal capacities, systems and processes as well as their strategic alliances and performance within the network and systems in which they operate. To carry out this work, in collaboration with USAID and its partner organizations, CSA developed methodologies and tools that were integrated and customized according to the best practices in capacity development, including HICD, Capacity 2.0, and the Local Systems approach.

## **CIVIL SOCIETY ACTIVITY'S STRATEGY IN GENDER AND INCLUSION**

CSA's efforts to incorporate gender and inclusion (G+I) in its capacity development approach was based in three key strategies:

*Integrate a G+I perspective at the internal level of an organization:* CSA implemented its Integrated Assessment Tool and solution packages in order to strengthen internal processes at an institutional level. In addition to the Gender and Inclusion solution package, CSA mainstreamed the G+I perspective into its twelve other packages.

*Integrate a G+I perspective to improve the organization's performance in its environment:* Secondly, at the external level, the gender perspective was integrated by walking the organization through the process of forming and sustaining strategic alliances with key stakeholders in different sectors, and developed a sustainable learning community model in which CSOs exchanged best practices and collaborated to better position themselves in the system in which they operate, access resources and promote sustainability. This document will provide three examples: 1) the CreActívate Project, by Consejo Cívico de Instituciones of Coahuila, which strengthened alliances among employers, CSOs and the university to contribute to crime and violence prevention, which was successful at providing victims of gender-related violence and youth in conflict with the law in the state of Coahuila access to career and vocational opportunities; 2) The project implemented by Red Mesa de Mujeres de Ciudad Juárez, a network of organizations that developed a new model to protect women's rights in the state of Chihuahua in collaboration with local authorities, CSOs, and citizens; and 3) CICADES (Centro de Investigación, Capacitación y Atención para el Desarrollo Social), which

<sup>4</sup> Human and Institutional Capacity Development (HICD) is a USAID model that addresses performance gaps in CSOs through the implementation of a wide range of performance solutions that are adapted to the context of each organization, promoting continuous improvement processes. When carrying out HICD initiatives, the goal is to strengthen the capacities of partner organizations to help them perform more effectively.

USAID. n.d. "Human and Institutional Capacity Development." <https://usaidlearninglab.org/library/human-and-institutional-capacity-development>

<sup>5</sup> USAID. n.d. "Capacity 2.0." Accessed July 27, 2020. <https://usaidlearninglab.org/library/capacity-20>

<sup>6</sup> USAID. n.d. "Local Systems: A Framework for Supporting Sustained Development." <https://www.usaid.gov/policy/local-systems-framework>

<sup>7</sup> For more information on the Activity's approach, please consult the document titled *The Civil Society Activity's Systemic Approach to Capacity Development*, which is also part of CSA's Legacy Compendium.

<sup>8</sup> Influencers are leaders of systemic change in the civil society sector, whether they be organizations or actors that have established a notable position or level of collaboration in the sector.

established the very first Network for Gender and Human Rights in the state of Tamaulipas to confront and raise awareness around gender-based violence in the state of Tamaulipas, including femicide, forced disappearance, and domestic violence.

*Integrate a G+I perspective to strengthen the system in which the CSO operates:* Finally, in terms of systemic change, CSA awarded grants to support the implementation of partner organizations' projects, incorporating gender and inclusion both in their Theories of Change and in their indicators within their monitoring and evaluation strategies. The projects implemented by CSA's partner organizations contributed to changes in the local system and in dynamics that affect populations that are highly-vulnerable to gender-based discrimination and violence by promoting changes to laws and regulations, access to information, and spaces for collaboration, ultimately contributing to USAID's Development Objectives.

CSA's capacity development approach and its efforts to incorporate a gender and inclusion perspective within its partner organizations built upon the implementation of two assessment tools, the Organizational Performance Index (OPI) and the Organizational Capacity Assessment (OCA), which identify strengths and areas of opportunity in the internal capacities and organizational performance, respectively, in order to determine how to support organizations. Implementing these assessment tools allowed for a better understanding of key performance areas that required more attention in order to strengthen the Activity's cohort of organizations, whether in terms of their internal capacities or performance<sup>9</sup>.

These tools, particularly OCA, addressed gender- and inclusion-related subjects, both at **the mainstream level** (gender- and inclusion-based criteria that are integrated into each of the performance areas that the tool assesses) and also at a **thematic level**, given that an entire performance area is dedicated to the subject of G+I. Therefore, the Activity's findings and recommendations for capacity development took into consideration gender-based areas opportunity to strengthen capacities and organizational performance from the beginning of the process.

In addition to the **mainstream integration strategy** and the **thematic integration strategy**, a third, **specific integration strategy** was also implemented, which was adopted by CSA to address specific concerns related to the incorporation of a gender and inclusion perspective within organizations through particular activities designed to strengthen its partner organizations (webinars, mentorships, etc.). These three strategies will be explained in detail throughout this document.

## **GENDER AND INCLUSION PERSPECTIVE WITH INTERNAL AND EXTERNAL APPROACHES**

As mentioned in the previous section, the Activity's efforts to incorporate G+I mirrored CSA's overall systemic approach that guided its implementation: 1) focusing on developing internal capacities (HICD); 2) connecting with other actors (Capacity 2.0), and 3) a Local Systems approach. This section will provide some examples of how CSA has managed to do so:

<sup>9</sup> The OPI and OCA tools are explained in detail in Section IV of this document, "Tools to Identify Strengths and Areas of Opportunity During the Institutionalization of the Approach".

## Strengthening internal capacities:

The process of institutional strengthening in areas of gender and inclusion involved the implementation of three strategies designed by CSA:

- **Thematic integration:** This strategy includes providing gender-related technical assistance by means of implementing the Gender and Inclusion solution package to strengthen CSOs that were awarded grants and requested this package following their organizational performance assessment.
- **Mainstream integration:** A strategy that was used to strengthen organizations that did not include gender-related technical assistance as a priority in their performance assessments, but prioritized strengthening in G+I for other reasons, and thus incorporated gender and inclusion to galvanize their approach. Capacity development interventions were carried out through complementary solution packages that incorporated approaches rooted in gender and inclusion, for example: Strategic Planning with gender perspective; Monitoring and Evaluation with gender perspective, Human Resources with mainstream gender perspective, Internal Processes with gender perspective, among others, and also by providing technical assistance to organizations in specific issues or subjects in which the CSOs demonstrated interest in integrating a gender and inclusion perspective.
- **Specific integration:** This strategy consisted of workshops, seminars, webinars and specific activities that allowed for learning to take place in partner organizations in a prompt and specific manner.

Each of these strategies will be further analyzed in the following sections. Success stories will be provided as well.

The following figure demonstrates the structure of the Gender and Inclusion solution package.

### *Gender and Inclusion Solution Package*



#### CONTENIDOS

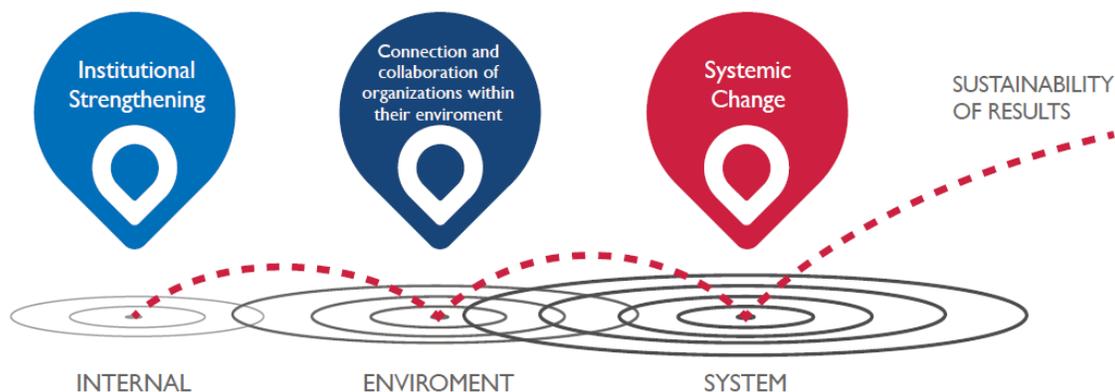
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### Strengthening Organizational Performance with an Approach Rooted in Gender and Inclusion:

CSA promoted collaborations and connections between CSOs and other actors through learning communities, workshops, webinars and other capacity development interventions, promoting the creation of strategic alliances and other forms of exchange in ways that held to an approach rooted in G+I within organizational cultures. In addition, the Activity provided technical support and developed content to promote the integration of a gender and inclusion perspective within the organizations' technical projects, thus contributing to USAID's Development Objectives (DOs), which seek systemic change and sustainability.

It is worth mentioning that capacity development in areas of G+I was not only provided to CSA's allied CSOs, but also to the Activity's own technical staff, including CSA staff, and consultants and subcontractors working for the program. CSA's integrated and holistic vision started by strengthening the Activity's own internal capacities, focusing on gender mainstreaming and incorporation, which then proceeded to incorporating the approach within external actors, seeking to improve CSOs' performance, and ultimately impact the system as a whole. In this regard, Gender and Inclusion itself was a cross-cutting theme that supported the Activity's systemic approach. The following figure demonstrates CSA's overall strategy.

*Civil Society Activity's Overall Strategy*



## **BENEFITS OF INCLUDING A GENDER AND INCLUSION PERSPECTIVE IN CIVIL SOCIETY ORGANIZATIONS**

When, for whatever reason, discriminatory and exclusionary practices prevail within the culture of an organization, not only individuals are affected, rather the entire organization is negatively affected, undermining its ability to properly manage its human resources, which has a negative effect on productivity, efficiency and competitiveness.

The challenge of including a gender perspective through strategic planning rests in making meaningful progress towards achieving equality between women and men; recognizing and eliminating violence against women, members of the LGBTQI population, and other minority groups; promoting a cultural shift in which individuals recognize each other as

peers and demonstrate mutual respect; cultivating an organizational culture supported by plans to define and implement actions, guidelines, protocols, and other initiatives that promote non-discrimination, equal opportunities, and human rights.

Civil society organizations that work to defend human rights, prevent crime and violence, and improve access to the justice system are required to do more than just include a gender perspective in their agendas. They must also design concrete plans to improve their internal structure and create the adequate conditions so that their employees and collaborators may work and grow to their full potential within an equitable environment.

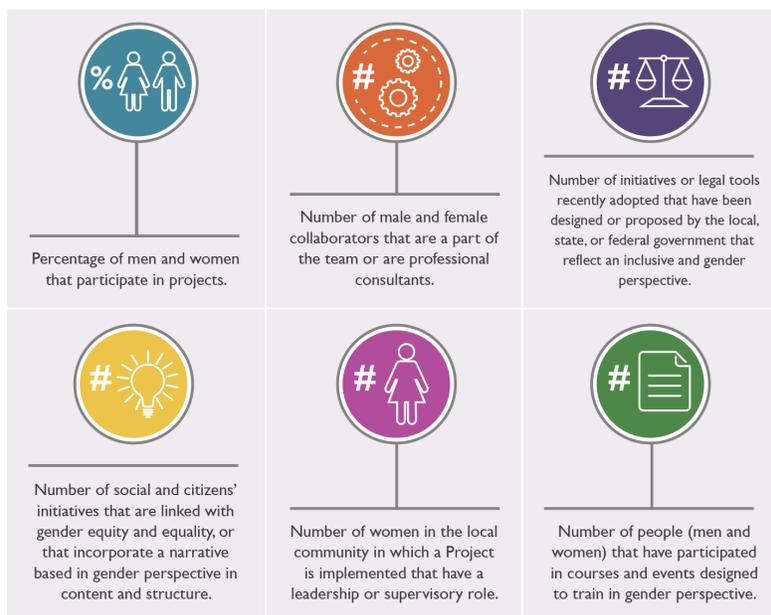
### III. CSA’S CONTRIBUTION TO INCORPORATING A GENDER AND INCLUSION PERSPECTIVE IN PARTNER CSOs

#### STRATEGIES FOR THE INTEGRATION OF G+I INTO CSA’S PARTNER CSOS

Gender and Inclusion was a cross-cutting theme in all that CSA did. To ensure that this integration took place, two measures were taken. First, through the incorporation of a gender and inclusion component in CSA’s organizational performance assessment and by designing a G+I solution package that was custom-built according to the specific needs of each CSO, as well as mainstreaming the G+I perspective in other solution packages. Second, by ensuring that every partner organization submitted and implemented monitoring and evaluation plans for their technical projects that included disaggregated data by age and sex, and also by centering the gender perspective in specific solution packages covering programmatic development, like Monitoring and Evaluation, and Project Design. The following figure provides some examples of gender and inclusion mainstreaming in the development of indicators, which are included in the Facilitator’s and User’s Manual that complement the Project Design solution package.

Examples of Gender Perspective Indicators: Project Design Solution Package

#### EXAMPLES OF INDICATORS WITH AN INCLUSIVE AND GENDER PERSPECTIVE



Additionally, CSA mainstreamed gender and inclusion in practical and theoretical exercises that are part of the Monitoring and Evaluation package so that CSOs' teams can learn how to include a gender and inclusion perspective in their projects, as the following illustration shows:

### COMPARING OBJETIVES AND INDICATORS THAT ARE SENSITIVE AND NONSENSITIVE TO GENDER PERSPECTIVE AND PEOPLE IN VULNERABLE SITUATIONS

NOT SENSITIVE TO GENDER PERSPECTIVE AND PEOPLE IN VULNERABLE SITUATIONS	SENSITIVE TO GENDER PERSPECTIVE AND PEOPLE IN VULNERABLE SITUATIONS
<p><b>Objective A:</b> Implement a program to prevent domestic violence.</p>	<p><i>Objective A: Implement a program to prevent domestic violence with a focus on individuals with scarce resources, including women and men in rural communities.</i></p>
<p><b>Indicator A:</b> Number of participants that have completed training.</p>	<p><i>Indicator A:</i></p> <ol style="list-style-type: none"> <li>1) Number of participants that have completed training (disaggregated by sex and geographic area).</li> <li>2) Percentage of participants that can list at least three signs of domestic violence (disaggregated by sex, age, and geographic area).</li> </ol>
<p><b>Objective B:</b> Involve the community in a process to create a community policing model.</p>	<p><i>Objective B: Involve the community to participate in an inclusive process to create a community policing model with an emphasis on marginalized female and male populations.</i></p>
<p><b>Indicator B:</b> Number of working groups created and in operation.</p>	<p><i>Indicator B:</i></p> <ol style="list-style-type: none"> <li>1) Number of working groups created and in operation that are composed of a balanced representation between men and women, adults and young people.</li> <li>2) Proportion of women in leadership positions within the working groups.</li> </ol>



#### INTEGRATING GENDER PERSPECTIVE AND PEOPLE IN VULNERABLE SITUATIONS

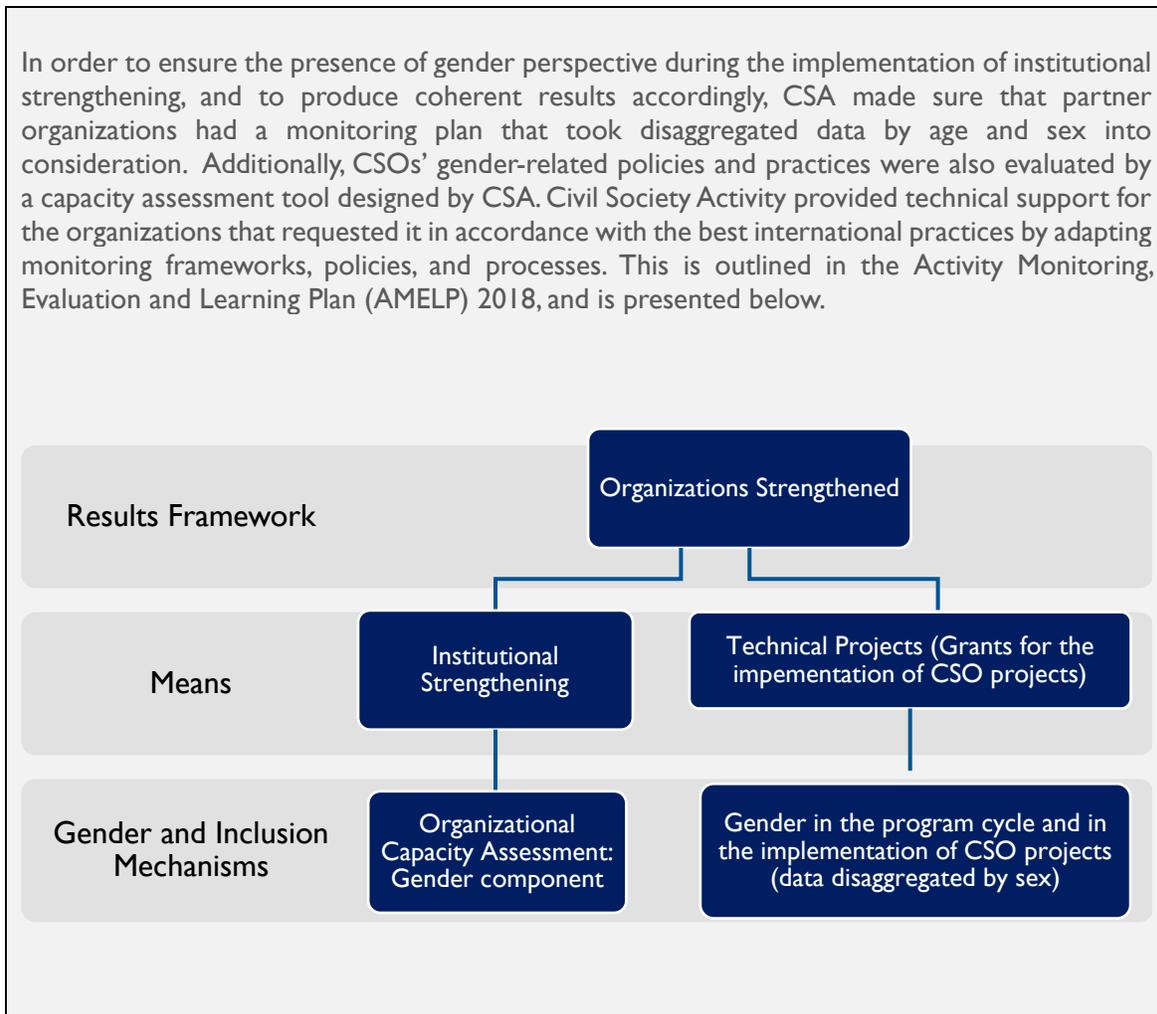
**Instructions:** Read the objectives and indicators in the following table carefully and develop an alternative that is more sensitive to the gender perspective and people in vulnerable situations.

#### EXERCISE 2.3.a

NOT SENSITIVE TO GENDER PERSPECTIVE AND PEOPLE IN VULNERABLE SITUATIONS	SENSITIVE TO GENDER PERSPECTIVE AND PEOPLE IN VULNERABLE SITUATIONS
<p><b>Objective A:</b> Create a Network of Young Agents of Peace (NYAP) composed of youth in conflict with the law.</p>	
<p><b>Indicator A:</b> Number of groups of NYAP created and functioning.</p>	
<p><b>Objective B:</b> Implement relevant policies and protocols to combat the trafficking of persons with approaches that focus on attending to the victim.</p>	
<p><b>Indicator B:</b> Number of relevant policies and protocols implemented to combat the trafficking of persons with approaches that focus on attending to the victim.</p>	

By mainstreaming G+I in these solution packages, CSA encouraged the integration of gender and inclusion perspective in project design and in monitoring and evaluation, as well as in the analysis of problems and the design of solutions.

In order to ensure the presence of gender perspective during the implementation of institutional strengthening, and to produce coherent results accordingly, CSA made sure that partner organizations had a monitoring plan that took disaggregated data by age and sex into consideration. Additionally, CSOs' gender-related policies and practices were also evaluated by a capacity assessment tool designed by CSA. Civil Society Activity provided technical support for the organizations that requested it in accordance with the best international practices by adapting monitoring frameworks, policies, and processes. This is outlined in the Activity Monitoring, Evaluation and Learning Plan (AMELP) 2018, and is presented below.



## IV. TOOLS FOR IDENTIFYING STRENGTHS AND AREAS OF OPPORTUNITY DURING THE INSTITUTIONALIZATION OF GENDER AND INCLUSION

### CSA'S INTEGRATED ASSESSMENT TOOL

CSA implemented a series of tools and methodologies to measure each organization's baseline and track progress throughout the process of organizational development. This baseline was used as a point of reference when reporting findings and as a way to determine the recommended performance areas to strengthen and improve each organization's capacities in a tailored fashion. Based on agreements reached between CSA and each CSO on solution packages to implement, the organizations designed a work plan that outlined the capacity development activities and processes that were to strengthen their capacities and performance. Baseline measures were determined using two of the assessment instruments that were described earlier:

- OPI (Organizational Performance Index) measures results-based performance rather than internal capacities. OPI was important in incentivizing partner organizations strengthen their work in a way that improved their performance as a whole, which required monitoring organizations' performance in several performance areas, both in terms of internal aspects of performance, such as Efficacy and Efficiency, and outward-facing aspects of performance, such as Relevance and Sustainability<sup>10</sup>.
- The OCA (Organizational Capacity Assessment) was designed for a facilitated self-assessment of organizations' internal capacities, providing results that allowed organizations to create a tailored work plan for institutional strengthening. OCA helps organizations to reflect on their systems, processes and functions in comparison to best practices and international standards. The tool's ease of use and self-assessment approach to application contributes to organizations' appropriation of their own work plans for strengthening. Based on the results and discussion that are generated from the assessment, the organization may establish priority activities they need to follow in order to strengthen their internal capacities<sup>11</sup>.

### BASELINE FINDINGS FROM THE ORGANIZATIONAL CAPACITY ASSESSMENT (OCA)

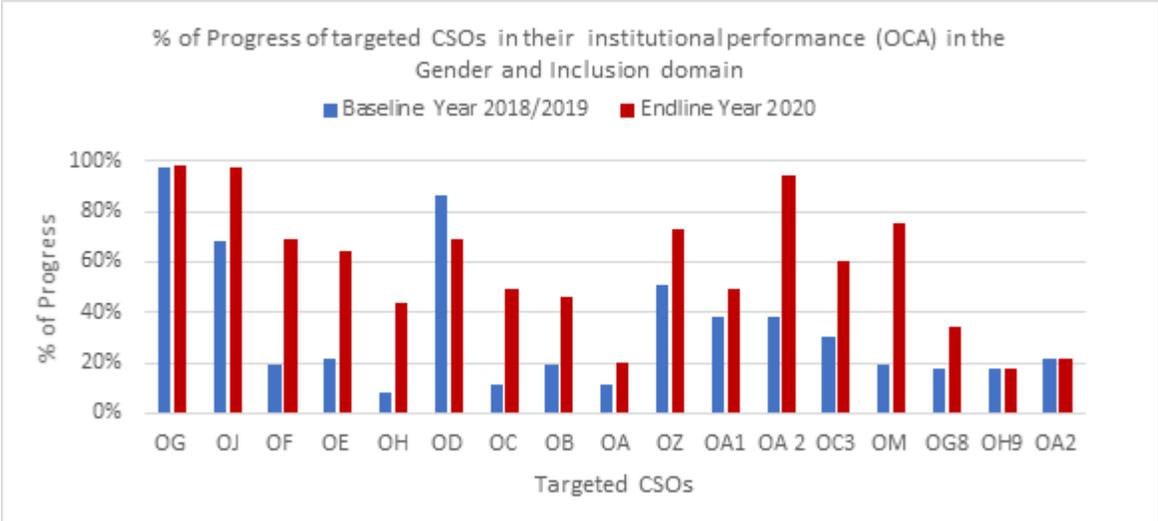
The Organizational Capacity Assessment (OCA) consists of eight strategic areas of performance, one of which is dedicated to Gender and Inclusion. The Gender and Inclusion performance area is subdivided into four components: Policies, Implementation, Protocols, and Information Dissemination. An organization's ability to satisfy any given criteria is determined based on its ability to demonstrate the corresponding evidence of policies or practices. The Gender and Inclusion performance area has criteria that reflect best practices and international standards for the institutionalization of gender and inclusion perspectives across the organization. In addition, G+I is a cross-cutting theme in other performance areas that OCA measures, especially those involving human capital, planning and leadership, and monitoring and evaluation. Finally, the assessment criteria were formulated using inclusive language.

<sup>10</sup> OPI: Organizational Performance Index. *USAID Learning Lab, Organizational Performance Index Measurement Tool, 2015.* <https://usaidlearninglab.org/library/organizational-performance-index-measurement-tool>.

<sup>11</sup> OCA: Organizational Capacity Assessment. *USAID Learning Lab, Organizational Capacity Assessment, 2016.* <https://usaidlearninglab.org/library/organizational-capacity-assessment>

Based on the abovementioned strategies for strengthening CSA’s partner CSOs in areas of gender and inclusion, it is expected that organizations evolve in mainstreaming gender and inclusion into their organizational culture, processes and practices over a period of one to two years’ time.<sup>12</sup> CSA’s designed and implemented specific strategies that advanced this process, which consisted of the implementation of the Gender and Inclusion solution package and the other activities, such as those mentioned in the mainstream strategy and the specific actions strategy. The following graph demonstrates baseline vs. end line results in gender and inclusion according to OCA:

*Evolution in CSOs’ G+I Capacity 2018-2020*



The examples of organizations presented here represent the different kinds of organizations that CSA worked with, i.e. Tier 1 and Tier 2 organizations. Tier 1 organizations were awarded grants to support the implementation of a thematic project, while Tier 2 organizations were USAID partner organizations that were recommended to CSA. Most organizations were based in Northern and Central Mexico, though not exclusively. Some organizations have managed to diversify and expand their geographic scope given their capacity to create and sustain strategic alliances and achieve a high degree of social impact.

Though all of the CSOs featured in this document went through some sort of institutional strengthening in gender and inclusion, the strengthening process was different in each case given their diverse nature. Some organizations opted to receive the Gender and Inclusion solution package. Some CSOs mainstreamed Gender and Inclusion in other solution packages they received, such as Human Resources, Strategic Planning, and Communications. Others preferred to receive technical support in areas of Gender and Inclusion through specific actions, such as webinars, training courses, and technical guidance, or through learning communities. One webinar organized for all CSOs provided a general overview of gender and inclusion, while other virtual workshops were directed towards consultants to strengthen their integration of a gender and inclusion perspective within their areas of expertise. Finally, at a systemic level, strategic alliances were formed between CSOs based on their technical and thematic projects that advanced USAID’s Development Objectives.

<sup>12</sup> It is important to mention that all institutional strengthening activities were decided upon by the partner CSO. As such, the chart presented here does not display all of CSA’s partner CSOs, only those that prioritized strengthening in Gender and Inclusion.

Percentage of Improvement in G+I Capacities in CSOs 2018-2020

CSO	Gender and Inclusion	
	2018/2019	2020
X1	97%	98%
X2	68%	97%
X3	19%	69%
X4	22%	64%
X5	8%	44%
X6	86%	69%
X7	11%	49%
X8	19%	46%
X9	11%	20%
X10	51%	73%
X11	38%	49%
X12	38%	94%
X13	30%	60%
X14	19%	75%
X15	18%	34%
X16	18%	18%
X17	22%	22%

The following sections detail the different ways in which mainstream integration, specific integration, and subject-specific integration strategies were implemented, and how they impacted the progress described in this document.

### **AREAS OF OPPORTUNITY IDENTIFIED THROUGH THE ORGANIZATIONAL CAPACITY ASSESSMENT (OCA)**

The OCA tool's fourth performance area, Gender and Inclusion, helps to understand which organizations improved significantly upon implementing the different actions to strengthen their capacities in areas of gender and inclusion. This performance area consists of four components: policy, implementation, protocols, and information dissemination.

When analyzing OCA results, CSA traced the development of organizations that received capacity development support in G+I to find that organizations reported most strength in organizational policy. This was accomplished by implementing several different strategies to integrate G+I into the CSOs.

*Sample of Selected CSOs with Most Improvement in Gender and Inclusion, 2018-2020*

CSO	Policies	Implementation	Protocols	Information Dissemination
<b>2020</b>				
CSO 1	100%	100%	90%	100%
CSO 2	100%	100%	85%	100%
CSO 3	93%	68%	58%	48%
CSO 4	75%	55%	75%	50%
CSO 5	59%	60%	50%	0%
CSO 6	100%	100%	100%	68%
CSO 7	66%	80%	75%	83%
CSO 8	88%	50%	23%	18%

The most successful component, referred to as **policies**, focuses on:

- Reviewing the organizational chart with a gender perspective.
- Implementing mechanisms so that women are well represented and hold decision-making positions in an organization.
- Creating policies that promote gender equality, inclusion and non-discrimination.
- Developing written mechanisms in order to monitor gender equality, inclusion, and non-discrimination policies.
- Enacting recruitment procedures that promote gender equality and that consider applicants' personal situation as relevant.
- Creating and executing policies that promote work equality and non-discrimination principles in the different areas and tasks of the organization.

The fourth component, referred to as **information dissemination**, in which the least amount of CSOs reported progress, entails the following:

- Spreading information among the team about gender and inclusion policies, either digitally or in print.
- Organizing activities to verify that the policies of gender and non-discrimination are well understood and are applied correctly at every level of the organization.

It is important that measures taken by the organizations (whether it be developing organizational charts with a gender perspective, plans or policies for equality and inclusion, recruitment procedures

that are inclusive and non-discriminatory, or other actions aimed towards reaching work equality and non-discrimination) are not only written down, but also spread throughout the organization so that each member of the staff is familiar and knows how to comply with any given measure.

## V. STRATEGIES FOR MAINSTREAMING GENDER AND INCLUSION IN THE STRENGTHENING OF CSOs

The following section provides information on the three strategies that CSA implemented to mainstream a gender and inclusion perspective: **1) Thematic integration**, **2) Mainstream integration**, and **3) Specific integration**. Key characteristics and benefits of each strategy are described along with the challenges and resistance faced during implementation. Finally, success stories are provided to demonstrate how each strategy may be incorporated.

### THEMATIC INTEGRATION STRATEGY

#### Thematic Integration and its Benefits

Upon analyzing OCA results in the G+I axis, some organizations decided to implement the Gender and Inclusion solution package. It is worth noting that organizations did not decide to implement the solution package based solely on the numeric values of the results (incipient, developing or mature capacities), rather they gave priority to G+I based on a genuine interest and commitment to promote gender equality and non-discrimination, especially by the leaders of the CSOs, often to better understand how to incorporate gender, inclusion and non-discrimination in analyses, and how to institutionalize a feminist stance. In this regard, leadership was paramount in making decisions for organizations to get involved with the subject, deepen their knowledge and develop an awareness of gender and inclusion.

The organizations included in this integration process had already adopted a feminist posture and/or had enough information about the importance of focusing on the analysis of women's rights and/or gender discrimination while increasing their capacities. This allowed them to increase their knowledge through the implementation of the solution package. Of the organizations that opted to incorporate G+I into their capacity development process, most presented the following characteristics:

- Use of inclusive language, both internally and externally
- Regular training to better understand gender perspective
- Gender criteria incorporated into the organization's objectives and actions
- Teamwork based in equality and non-discrimination

*Which were the main areas for the organizations to strengthen?*

Despite demonstrating a genuine interest in the topic, organizations needed to strengthen the practice of documenting institutional guidelines, planning, procedures and/or policies in areas of gender, inclusion and non-discrimination **in writing**. In other words, there were no formal mechanisms to monitor policies regarding gender equality, non-discrimination. Documenting these policies in writing contributes to the process of institutionalizing G+I-related topics within the organization.

By incorporating thematic and focalized interventions in G+I – often by mainstreaming the perspective in other solution packages in areas such as Monitoring and Evaluation, Project Design, Human Resources, Strategic Planning and so forth – organizations were able to prioritize the strengthening of their gender perspective in the component that demonstrated most areas of opportunity in the OCA assessment, to include policy-making (tracing and organization chart with gender perspective, creating mechanisms to ensure women representation in decision-making positions in the organization, crafting plans or policies that promoted equality, inclusion and non-discrimination, and establishing monitoring mechanisms for such plans and policies).

Organizations that implemented the gender and inclusion solution package reported an important benefit of implementing the focalized/thematic integration strategy, highlighting their newfound ability to include the gender perspective in their management processes by strengthening their equality plans and creating a concrete, specific organizational Workplace Equality and Non-Discrimination Policy.

Ultimately, organizations that invested time and effort to implement the G+I Solution Package produced a written Gender, Equality and Non-Discrimination Policy, as well as Protocols for the Attention and Prevention of Sexual Harassment and Discrimination in the Workplace. Both are essential tools for organizations to address human rights and prevent violence among their own staff.

## Challenges

Less than 20% of the total number of organizations that experienced some form of capacity development in gender and inclusion chose to implement the Gender and Inclusion solution package. This is an indication that there is still a long way to go for organizations to be aware of just how important it is to incorporate G+I in their work in areas of human rights, access to justice, and violence prevention, and to receive specific training on the matter. Ideally, all organizations would have prioritized the implementation of the Gender and Inclusion solution package in order to assemble the full set of tools, policies, and protocols. Although it is likely that many organizations are able to address important matters in areas of gender and inclusion on a day to day basis, lacking written policies, procedures and practices contributes to the risk that their commitment to gender equality, non-discrimination and inclusion may become diluted, particularly with the arrival of new staff or when leaders and colleagues that are involved with champion gender and inclusion leave their positions.

## Success Story

### **Salud y Bienestar Comunitario, A.C. (SABIC): Community Organization in Ciudad Juárez.<sup>13</sup>**

Salud y Bienestar Comunitario, A.C. (from here on: SABIC, which stands for Community Health and Wellness) is an organization that formed in 2003 as the result of the collective effort of women in Western Ciudad Juárez. SABIC's mission is to promote equality by seeking to improve the quality of life of vulnerable communities, offering quality and accessible health services from a gender and biopsychosocial perspective, promoting access to health as a basic human right, and providing comprehensive attention to women and young girls that have been victims of gender-related violence through a holistic treatment that includes both medical services and psychological and emotional support. One of SABIC's priorities is to provide equal treatment

<sup>13</sup> The publication of this case study has been authorized by Salud y Bienestar Comunitario, A.C. (SABIC).

and equal opportunities by offering courses, workshops and campaigns that focus on the prevention and awareness of gender-based violence.

SABIC's capacity development process included the implementation of the Gender and Inclusion solution package in addition to solution packages in Human Resources, Monitoring and Evaluation, and Resource Mobilization. Upon implementing the Gender and Inclusion solution package, SABIC progressed from 38% to 94% capacity in areas of gender and inclusion across the four components mentioned above: policies, implementation, acting protocols, and information spreading. Among the organization's primary achievements are:

- An increase in capacities among SABIC staff and the organization's network of community therapists.
- An Equality and Non-Discrimination Policy that applies to the organization's staff, external technical advisors, volunteers and beneficiaries of SABIC's programs that has been adopted by the organization's Board of Directors.
- A Protocol to Prevent and Act Against Discrimination and Sexual Assault and Harassment, which details how the organization attends to sexual assault and harassment, particularly among the CSO's target audience (women and girls who are victims of violence, their families and the harassers).
- A Committee to provide follow-up to the implementation of the organization's Equality and Non-Discrimination Policy that will oversee compliance with the principles of gender equality, inclusion, and non-discrimination.
- A Monitoring and Evaluation Plan that includes gender perspective with indicators to monitor the implementation of the Gender Equality and Non-Discrimination Plan.
- A plan to train and create dialogue around issues of gender and inclusion, organized by the very team members and strengthened by "agents of change" who collaborate with the organization, including feminist volunteers that participate in activities organized by SABIC.

## MAINSTREAM INTEGRATION STRATEGY

### Mainstream Integration and its Benefits

The strategy for mainstream integration involved the implementation of several solution packages covering various topics (among them, Strategic Planning, Monitoring and Evaluation, Human Resources, Communications and Digital Strategy, and Resource Mobilization), most of which included content with a gender and inclusion perspective during its implementation. By doing so, organizations addressed key areas of opportunity through institutional strengthening while simultaneously incorporating a gender perspective, and thus ensuring the mainstreaming of the approach.

As mentioned in the previous section, only a small number of organizations prioritized the implementation of the G+I solution package, due in part to time constraints. However, a great deal of organizations requested that a gender and inclusion perspective be an integral part of their strengthening during the implementation of other solution packages. For instance, in the case of many CSOs, a gender and inclusion perspective was an essential component of the implementation of the **Human Resources solution package**. This resulted in a large group of organizations that achieved priority goals in gender and inclusion, such as establishing

organizational **policies in gender and inclusion**. Also, gender mainstreaming in the Human Resources solution package contributed to important progress regarding the development and implementation of **protocols for the prevention of sexual assault and harassment, and discrimination**. Although CSOs achieved important progress by incorporating gender and inclusion during the implementation of the Human Resources package, they will need to focus their attention on the proper communication of new policies, guidelines and protocols, and on the design of specific activities in order to ensure that staff becomes familiar with them. With few exceptions, CSA's partner organizations had not yet managed to effectively communicate new policies, guidelines, and protocols to staff by the close-out of the Activity.

Progress made by mainstreaming integration resulted from the following actions:

- Producing a written policy on gender equality, inclusion, and non-discrimination in accordance with national and international standards (CEDAW, Belem Do Pará).
- Creating written protocols with guidelines on how to operate with a gender perspective and how to prevent violence and different forms of discrimination.
- Producing a Human Resources Manual and an ethics code to reinforce principles of equality in the workplace and to incorporate a gender and inclusion perspective in the organizational structure and thematic programs.
- Developing concrete actions and mechanisms to supervise compliance with protocols regarding gender and inclusion perspective and providing the team members with adequate information about gender-related policies (knowledge dissemination). Some organizations went a step further and developed periodic evaluations in order to evaluate the level to which personnel understood new policies.
- Some organizations managed to establish monitoring and communication mechanisms to monitor the implementation of their gender equality, inclusion, and non-discrimination policy.

As part of one organization's strategy to ensure that strengthening activities were directed towards policies through mainstream integration, the team designed a recruitment process for their personnel that was rooted in a gender and inclusion perspective. Another organization established a fixed budget for performing actions that promote gender equality.

A different group of organizations demonstrated progress in the **design and implementation of organizational protocols that reflect a gender and inclusion perspective**, such as integrating the use of inclusive language both in the external and internal communications of the organization during the implementation of the **Communications and Digital Strategy**. For this group of organizations, the following capacity development activities were important:

- Developing contingency strategies with a gender perspective.
- Integrating gender perspective into internal/external communications.
- Producing manuals for the correct use of social media with a gender and inclusion perspective.
- Creating campaigns to visibilize strategic alliances, organizational activities and human rights violations, aiming to promote the rights of women and girls.
- Strengthening organizations' attention and response to gender-based social issues so as to protect women's and girls' rights and eradicate violence against them, as well as mainstream gender perspective in government agencies.

During the implementation of the **Resource Mobilization solution package**, a couple of organizations focused their efforts on the following strengthening activities:

- Establishing a plan for resource mobilization and diversification with a gender and inclusion perspective.
- Generating references for feminist funding institutions that provide financial and/or technical support to organizations that promote the rights of women and girls and/or the prevention of gender-based violence.

Through the **Strategic Planning solution package**, organizations mainstreamed a gender and inclusion perspective in the following activities:

- Rethinking annual operation plans and strategic plans from a gender perspective, using participatory analysis techniques.
- Establishing specific strategic objectives with a gender and inclusion perspective.
- Ensuring a gender-based analysis during the planning process with their target population(s).
- Defining an annual operation plan, financial plan, and a proposed matrix of Key Performance Indicators (KPIs) to monitor and evaluate strategic planning from a gender and inclusion perspective.

Finally, when implementing the **Monitoring and Evaluation solution package** with a gender and inclusion perspective, organizations carried out the following strengthening activities:

- Creating mechanisms to monitor gender equality, inclusion, and non-discrimination policies.
- Ensuring that gender analysis and disaggregated data by sex are considered throughout monitoring, evaluation, and learning frameworks and practices.
- Establishing Strategic Planning indicators from a gender and inclusion perspective.
- Revising the format and logic of indicators, databases, and Theories of Change.

As discussed in Section III, the gender and inclusion perspective was also mainstreamed by providing guidance on how to define gender-based indicators in the Project Design solution package and guides. The Project Design solution package provides a chart featuring examples of indicators that are based in a gender and inclusion perspective). In addition, gender mainstreaming took place during the implementation of the Monitoring and Evaluation solution package by providing concrete examples and practical exercises to explicitly incorporate gender and inclusion perspective into MEL activities. For instance, the figure in Section III displays objectives and indicators that are either sensitive or insensitive to gender and vulnerable groups.

## Challenges

The most requested gender and inclusion integration strategy among CSA's partner organizations was, undoubtedly, the mainstream integration strategy. This strategy required that the Activity **align the work of consultants with different profiles, coordinating the interventions of experts on gender issues with the experts on the various subjects covered by other solution packages, all of whom were supervised by members of CSA's Institutional Strengthening team.** Ultimately, the mainstream integration of G+I turned out to be an exceptionally good practice for the Civil Society Activity, allowing organizations to improve their performance in specific areas (human resources, strategic planning,

communications, resource utilization, monitoring and evaluation, financial management), while they also received technical support to incorporate gender perspective. However, organizations did not always fulfill full integration, such that they have work left to do to as part of their future strengthening. The following are areas of opportunity in which CSA's partner organizations can focus their efforts to continue incorporating the G+I perspective:

#### Human Resources:

- Produce a written document to ensure that the different manuals, policies, and processes in areas of human resources, gender, strategic planning and/or monitoring and evaluation become widely available to every member of the organizations. Ensure that staff become familiar with new manuals, policies, and processes so that guidelines may be properly implemented.
- Promote the understanding of gender, inclusion, and non-discrimination policies by every member of the personnel and provide the appropriate training.
- Establish a protocol for the attention and prevention of sexual harassment and assault in the workplace and establish an effective way to communicate the protocol to the organization.
- Design specific mechanisms to supervise the compliance with gender and inclusion protocols, specifying the individuals responsible for this role and the corrective actions in case of non-compliance.

#### Monitoring and Evaluation:

- Create gender indicators for strategic planning.
- Institutionalize a plan for monitoring and evaluation, with indicators that include disaggregated data by sex and, ideally, a gender-based analysis when defining indicators.
- Conduct an analysis of social change in the Theory of Change based in a gender and inclusion perspective.
- Develop a Monitoring and Evaluation Plan for the entire organization and not just by project.

#### Strategic Planning:

- Assure that both the annual strategic plan and the annual operation plan feature a gender perspective.
- Define specific strategic goals in terms of gender perspective.
- Prioritize a gender-based analysis during participatory planning processes with target populations.
- Develop an annual operation plan, financial plan, and indicators to monitor and evaluate the strategic plan from a gender and inclusion perspective.

#### Communications and Digital Strategy:

- Design inclusive communication strategies.
- Develop contingency strategies with gender perspective.
- Mainstream gender perspective into both internal and external communications.
- Develop manuals for using social networks with gender perspective.

- Design and execute campaigns to visibilize organizations' work in gender and inclusion, as well as strategic alliances and other actions that promote women's rights.

#### Resource Mobilization:

- Promote awareness around gender and inclusion among the organizations that receive donations.

### Success Story

#### **ASILEGAL: Organization that strengthens actors within the judicial system and defends imprisoned populations representing vulnerable communities<sup>14</sup>.**

Asistencia Legal por los Derechos Humanos, A.C. (from here on: ASILEGAL, which stands for "Legal Assistance for Human Rights") is a nonprofit organization created in 2006 to defend, promote and spread awareness of human rights for vulnerable groups. Its work contributes to providing access to justice for people that are in a vulnerable situation and have been withheld from their freedom, particularly women, indigenous populations, and the LGBTQI community, with a focus on human rights, gender perspective, intersectionality, progressiveness and multiculturalism. ASILEGAL stands out as a model organization for its inclusive perspective.

ASILEGAL is registered at the Organization of American States (OAS) and was awarded the special consultative status by the United Nations Economic and Social Council (ECOSOC). The organization is part of several networks and coalitions and is also part of the Network of Pro-Bono Lawyers coordinated by Sin Fronteras, a group that specializes in defending human rights of migrant populations. In May 2015, ASILEGAL became part of the Women's Global Network for Reproductive Rights (WGNRR).

Beginning in 2010, ASILEGAL's certified experts have trained justice workers on the implementation of systems of penal justice in states like Baja California, Oaxaca, Guerrero, Chiapas, Mexico City, Estado de México, Durango, Hidalgo and Puebla to press for compliance with new standards for human rights, torture prevention, and the implementation of the Ley Nacional de Ejecución Penal (National Law on Criminal Justice Enforcement). Moreover, ASILEGAL works to provide legal support to imprisoned individuals as the judicial system of Baja California transitions its approach towards social reintegration.

ASILEGAL demonstrates an explicit intention to defend human rights in its mission and vision, which are focused on providing legal, informative and educational support on matters that involve human rights for vulnerable groups, especially inhabitants of remote areas and indigenous communities, youth, women, and LGBTQI communities. By doing so, ASILEGAL seeks to contribute to the eradication of human rights violations within these particular groups.

One of the most meaningful principles of ASILEGAL's work is its focus on intersectionality, gender and multiculturalism. This is evidenced in the organization's activities that promote due process and access to justice through strategic litigation, research, and awareness campaigns that focus on the rights of LGBTQI people, which includes activities to train and professionalize justice

<sup>14</sup> The publication of this case study has been authorized by Asistencia Legal por los Derechos Humanos, A.C. (ASILEGAL).

workers, provide legal support and services for imprisoned populations with an inclusive perspective.

For ASILEGAL, the process of institutional strengthening included technical support to more efficiently manage its grant, legal strengthening, and the implementation of solution packages in areas of **Strategic Planning, Monitoring and Evaluation, Communications and Digital Strategy, and Resource Mobilization** in which a gender and inclusion perspective was mainstreamed. Ultimately, these capacity development interventions contributed to an increase in organizational capacities from 81% to 98% (OCA) in their institutional capacities and performance.

At the end of ASILEGAL's institutional strengthening process, and thanks to the incorporation of gender and inclusion, ASILEGAL now possesses:

- An annual operation plan and a five-year strategic plan, both of which reflect principles of human rights and gender perspective, intersectionality, progressiveness, and multiculturalism.
- A communications strategy including a contingency plan with gender perspective, inclusive language for both internal and external communications, and a manual for appropriate use of social networks with gender perspective.
- A Resource Mobilization Plan including references for feminist donor organizations.
- A grants management plan complemented by a revised Human Resources manual and ethics code, both of which now feature inclusive language and gender perspective.
- A Monitoring and Evaluation Plan that considers measures to effectively track the dissemination and knowledge of gender, inclusion, and non-discrimination policies among the team, including periodic evaluations on the subject.

## **SPECIFIC INTEGRATION STRATEGY**

### **Specific Integration and its Benefits**

The third strategy, which was implemented by thirty percent of the organizations featured in this document, consisted in providing technical support to organizations in specific subjects or issues that the CSO considered important in order to more fully incorporate a gender and inclusion perspective. This specific integration strategy was implemented in the form of courses, seminars, webinars and concrete actions designed to promote learning in a very specific and precise manner. Some of the most important specific integration strategies included:

#### **❖ Webinars:**

- Two webinars titled “Gender and Inclusion Mainstreaming: Feminisms and Masculinities.” The first webinar focused on a reflection about feminisms and the construction of masculinities; the second centered on a set of practices and techniques to institutionalize a gender and inclusion perspective within organizational systems, monitoring and evaluation practices, and protocols and procedures that seek to prevent gender-based violence and discrimination in the workplace.
- A webinar focused on reinforcing learnings from the first course on gender awareness.
- A webinar titled “What is gender perspective?”.

### ❖ Training courses:

Several on-site training courses took place, including:

- Gender, non-discrimination, and sexual diversity awareness
- Creating policies to promote equality and protocols to prevent and attend to sexual assault and harassment in the workplace
- Workplace equality with a gender and inclusion perspective
- Gender and gender perspective
- Creating an inclusive organizational culture
- Affirmative action, workplace equality and substantive equality

One tactic adopted by some CSOs, especially feminist organizations led by women, was to facilitate spaces to engage in internal, technical and/or awareness-raising debates. In this regard, recurring self-training initiatives, like the “Viernes de Conocimiento” (Knowledge Fridays), “Escuela de Igualdad Sustantiva” (Substantive Equality School), “Repensando a la Organización” (Rethinking the Organization), for instance, provide concrete examples of important spaces for dialogue that already take place in organizations in which leaders and the operational team dedicate time and effort to gender awareness and gender training.

### Challenges

The specific integration strategy requires that members of participating organizations already be aware of topics related to gender and inclusion. In other words, the organizations do not demonstrate reticence, though the Activity experienced other challenges:

- Leaders should be committed to women’s rights, inclusion, and non-discrimination. Without political will, it is hard to achieve any results.
- It is helpful to mobilize members of the organization that are experts on gender and inclusion, leaders of change, or gender champions that demonstrate awareness, commitment, and the technical knowledge needed to promote mainstreaming within the organization. This is a best practice that is not exclusive to the specific integration strategy, but is also helpful when implementing the thematic and mainstream integration strategies.
- Consider an exchange program or permanent training on the topic via webinars, courses, internal debates and workshops that contribute to an increase in awareness of gender and inclusion and technical training and provide continuing education opportunities<sup>15</sup>. The most desirable outcome is for the practice to become institutionalized.
- Foster collaboration between those coordinating different capacity development processes so that gender and inclusion mainstreaming may be well aligned with whatever organizational practice is being strengthened.

<sup>15</sup> Creating **awareness and self-awareness** pushes individuals to rethink their values and beliefs about personal daily life and the roles and stereotypes attributed to women and men based on their behaviors. **Technical training and analysis in gender perspective** contemplates the development of specific knowledge and skills: Knowledge of the situation specific to women and men, and groups that are discriminated against or excluded; Skills to formulate, analyze, plan and evaluate initiatives from a gender perspective. (For more information, please consult Corona, Mónica (2002) *Cultura institucional y equidad de género en la Administración Pública*. México: Instituto Nacional de las Mujeres [http://cedoc.inmujeres.gob.mx/documentos\\_download/100432.pdf](http://cedoc.inmujeres.gob.mx/documentos_download/100432.pdf))

## Success Story

**DOCUMENTA: A multidisciplinary organization that focuses on litigation, communication, and research to strengthen the justice system in Mexico.<sup>16</sup>**

Documenta: Análisis y Acción para la Justicia Social, A.C. (Analysis and Action for Social Justice) is a civil society organization that works to strengthen the justice system and develop public policies to defend human rights for incarcerated populations, people in conflict with the law and disabled populations in Mexico through strategies based on litigation, research and documentary film. Documenta has a multidisciplinary team of expert lawyers with experience in strategic litigation, research, psychology, communication, and documentary filmmaking who collaborate to strengthen legal, social, cultural and politic strategies. Documenta is committed to principles of equality and multidisciplinary, which are reflected in its mission and vision statements and drive the organization's efforts in strategic litigation, communication, research and strengthening strategies. These efforts are directed towards the creation of a new justice system, one that respects the human rights of incarcerated populations, those in conflict with the law, and individuals with psychosocial or intellectual disabilities.

The organization's emphasis on equality is one of the most central aspects of Documenta's programming. Documenta's programs focus on subjects such as Disability and Justice (seeking equitable opportunities and respect for the rights of people with psychosocial or intellectual disabilities), the Prevention of Torture (seeking to contribute to the visibility and prevention of torture and cruel, inhumane and degrading treatment or punishment against vulnerable populations in Mexico's detention centers), and the Penitentiary and Social Rehabilitation System (which strives for a more transparent, efficient and sound penitentiary system and social rehabilitation for imprisoned populations and those in conflict with the law).

For Documenta, the institutional strengthening process included the Gender and Inclusion, Monitoring and Evaluation, and Communications and Digital Strategy solution packages, as well as a workshop session focused on resource mobilization and strategic alliances. From the beginning of the collaboration, Documenta's team demonstrated a deep understanding of the principles of human rights, gender and inclusion, and intersectionality, which they have consistently applied in their work with their target populations. However, this understanding had not yet permeated the internal operations of the organization. Following the implementation of the solution packages and upon recruiting new staff, who were feminists, Documenta started to develop an implementation of a specific training strategy (courses, debates, webinars, discussion forums) **focused on strengthening their self-awareness and technical knowledge around gender and inclusion.**

Overall, these strengthening interventions allowed Documenta to progress from 19% to 69% capacity in gender and inclusion according to the Gender and Inclusion performance area of OCA: policies, implementation, acting protocols and knowledge dissemination.

## THE IMPORTANCE OF CHANGE LEADERS WITHIN ORGANIZATIONS

An organization's culture is defined by value systems that are shared by its members, which generate implicit and explicit agreements on which behaviors are considered appropriate and meaningful and

<sup>16</sup> The publication of this case study has been authorized by Documenta: Análisis y Acción para la Justicia Social, A.C.

which are not<sup>17</sup>. In this regard, organizational culture dictates the way that people within organizations relate to each other as well as of the values and beliefs that prevail in those relationships. In some organizations, there is a gap between the desired values and those that are actually present in the relationships between members, which is often the case when it comes to gender and inclusion. For instance, values may be reinforced through politically correct speech without there being a true intention of integrating gender equality inclusive practices into the organization's culture.

Given that CSA considered this issue worthy of attention, the Activity designed and implemented the aforementioned strategies and mechanisms to mainstream gender and inclusion in its partner CSOs. In doing so, the Activity learned about the importance of promoting the awareness of issues of gender and inclusion to support the construction of a culture of equality and non-discrimination. Furthermore, the Activity verified that once leaders demonstrate a willingness and political will to improve their organizational culture, and once **change leaders** and challenges were identified, there is more likelihood to progress towards a culture of equality, inclusion and non-discrimination.

<sup>17</sup> Hola, Eugenia y Rosalba Todaro. (n.d.) *Los mecanismos del poder: hombres y mujeres en la empresa moderna*. Centro de Estudios de la Mujer, Chile.

## CONCLUSION

In this learning document, CSA has shared its experience on incorporating a gender and inclusion perspective in partner organizations that participated in activities throughout the life of the Activity. In this regard, the Activity's objective is to continue to promote gender and inclusion mainstreaming in Mexico's civil society by raising awareness and sharing lessons learned when implementing its strategies, mechanisms, and methodologies.

Through the implementation of each one of the integration strategies described in this document, a seed was planted in CSA's partner organizations. At times, organizations could begin to see the tree start to grow. For the Activity, the implementation of the different integration strategies – mainstream, thematic and specific integration – and the different tools that were used (solution packages, learning communities, webinars, workshops, seminars, etc.) served as the means to create awareness and educate organizations about the importance of gender perspective in their internal institutional strengthening and their project cycles.

Through these efforts, the following point is reinforced: Any initiative that addresses gender inequality and that seeks to prevent discrimination and human rights violations, as little or simple as it may be, is important and necessary in order to promote human rights, violence prevention, and the strengthening of the justice system, in-line with USAID's Development Objectives that were advanced through the Civil Society Activity.

Finally, the Activity recommends that other capacity development projects and initiatives incorporate staff and consultants who are experts that are properly trained and experienced in gender and inclusion. By having the human resources with the experience, knowledge and commitment to gender and inclusion, it is more likely for a gender and inclusion perspective to permeate organizational cultures through capacity development, thereby tackling social problems that predominate in Mexican society, such as gender-based violence, discrimination and the exclusion of certain populations, and human rights violations.

Our hope is that sharing the Activity's experience will inform future capacity development interventions and programs in order to continue to promote gender equality and inclusion in the development agenda, just as USAID Mexico did through its Civil Society Activity.

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