



# THE GENDER AND SOCIAL INCLUSION TOOLKIT







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# INTRODUCTION

## TO THE GENDER AND SOCIAL INCLUSION TOOLKIT



“MANY CSOS ARE STILL ORGANISATIONS OWNED BY THE AFFLUENT AND PROVIDING SUPPORT TO THE NEEDY: THEY ARE ORGANISATIONS FOR THE PEOPLE THEY AIM TO SERVE. A TRULY RIGHTS BASED CSO NEEDS TO BE AN ORGANIZATION OWNED BY THOSE WHOSE RIGHTS ARE BEING DISREGARDED: THEY HAVE TO BE ORGANISATIONS OF THE POOR AND EXPLOITED. CSOS NEED TO REDEFINE THEIR IDENTITY AND RE-ALLOCATE POWER IN THE ORGANIZATION ACCORDINGLY.”<sup>1</sup>

### WHO IS THIS TOOLKIT FOR?

This toolkit has been designed for the Innovation for Change Hubs. It intends to be useful resource to all staff who are working at the Hubs, regardless of their position or title. The toolkit should also be made accessible to the organizations and members that the Hub works with, in order to help build a shared understanding and knowledge of gender and social inclusion across the Hub ecosystem.

### HOW TO APPLY THE TOOLKIT TO YOUR WORK

The toolkit has been designed to be a practical resource that can be used when designing activities, programs as well as being an input to more complex planning processes, such as a strategic plan.

There is a comprehensive guide to undertake a gender and social inclusion analysis in section 3: readers can follow each step to undertake the analysis and the information and knowledge they gather in the process, will constitute a baseline that Hubs can return to when they plan future programs etc.

The toolkit can also be used as a quick reference guide with key definitions and concepts available, as well as a range of resources available on working with marginalized groups.

### WHY GENDER AND SOCIAL INCLUSION?

NGOs and civil society are institutions of power in any given context: as the recipients of immense resources and decision making, their actions and decisions carry significant weight for the lives of the poor and marginalized. Particularly where oppressive regimes are increasingly questioning the legitimacy of civil society organizations as a strategy to suppress activism, it is more important than ever that civil society lives up to the principles they espouse.

Marginalized groups and identities are too often excluded from institutions of power and decision-making and from the very processes that affect their lives. As the conveners of civil society, Innovation Hubs have the potential to become diverse, pluralistic platforms that amplify the voices of the most marginalized

and excluded. The Hubs can close this perceived legitimacy gap between values and internal practices, by ensuring that hubs are accessible and accountable to all groups and by creating legitimate channels and platforms for diverse voices and actors to congregate and to build power.

“DIVERSITY IS THE KEY TO INNOVATION” IRR2018 PARTICIPANT

### OVERALL OBJECTIVES OF THE TOOLKIT

- To introduce the concept of gender & social inclusion and the importance of reaching key marginalized groups who are excluded from civil society and civil/political life more broadly.
- To provide a comprehensive tool to guides Hubs in undertaking a gender and social inclusion analysis and integrating GSI considerations into the programmatic cycle.
- To consider the long-term institutional requirements for embedding gender and social inclusion, through a self-assessment tool.

### PARTNER ORGANIZATIONS

Innovation for Change (I4C) is a global network of people and organisations who want to connect, partner and learn together to defend and strengthen civic space and overcome restrictions to our basic freedoms of assembly, association and speech.

We are a community-led network inspired by ideas, methods, and technologies from across different sectors. We work together on advocacy, research, network building, education and training, fundraising, digital literacy and technology development.

Our six connected regional hubs are growing in both physical and online spaces across Africa, Central Asia, East Asia, Latin America and the Caribbean, the Middle East and North Africa and South Asia. Here, people exchange ideas and share their successes, challenges and opportunities in incubating social change and building sustainable solutions.

Innovation for Change is curated by CIVICUS and Counterpart International.

- CIVICUS is a global alliance of civil society organisations and activists dedicated to strengthening citizen action and civil society throughout the world.
- Counterpart International (Counterpart) is a non-profit organization headquartered in and partners with local organizations – formal and informal – to build inclusive, sustainable communities in which their people thrive.

### GLOSSARY

Care has been taken to explain key concepts and definitions throughout the toolkit. For quick reference, here are some key terms to get familiar with:

**Civil society/civic sector** the arena – outside of the family, the state, and the market – which is created by individual and collective actions, organisations and institutions to advance shared interests. In principle, organised forms of civil society should be accountable to their constituencies and/or beneficiaries.

**Gender** refers to the social attributes and opportunities associated with being male and female and the relationships between women and men and girls and boys, as well as the relations between females and those between males. These attributes, opportunities and relationships are socially constructed and are learned through socialization processes.

**Intersectionality** is an analytical tool for understanding and responding to the ways in which gender intersects with other social characteristics and contributes to different experiences of oppression and privilege. Social Inclusion To improve the ability, opportunity, and dignity of people, disadvantaged on the basis of their identity, to take part in society.

**Social Exclusion** when individuals are unable to participate in the economic, social, political and cultural life of their society.

<sup>1</sup>Disrupt & Innovate, Act Big: <https://disrupt-and-innovate.org/topics/?alliances>, accessed 15th June, 2018.

# SECTION 1:

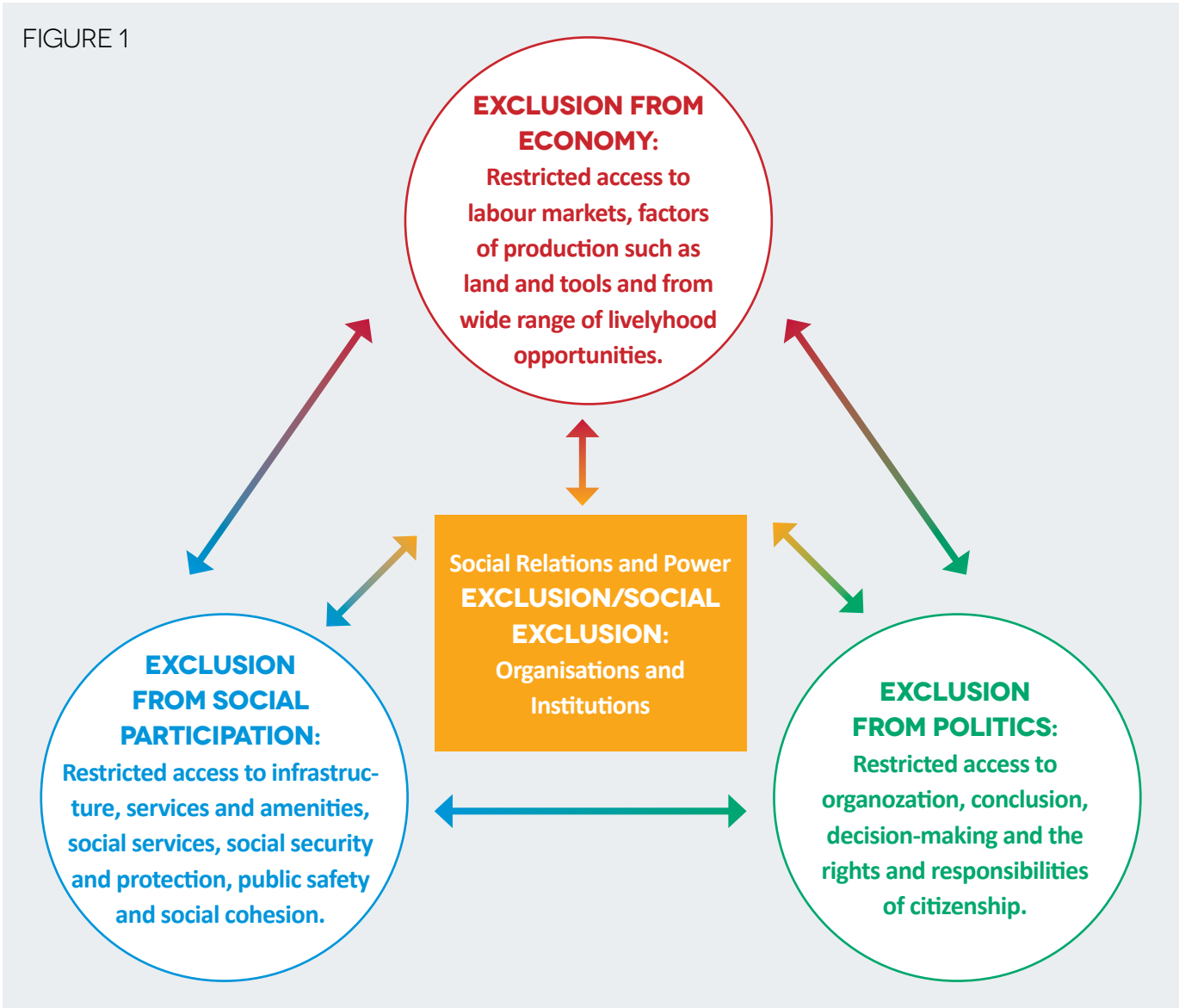
## UNDERSTANDING SOCIAL INCLUSION



### UNDERSTANDING EXCLUSION

**Social exclusion is when individuals or groups are unable to participate in the economic, social, political and cultural life of their society.**

Beall and Piron<sup>1</sup> explains how marginalized groups can become ‘stuck’ in this cycle of exile, excluded from each domain of society. See figure 1 below.



Through this dynamic process, marginalized groups are also denied access to powerful institutions and organizations. They can be deprived of their personal agency and control over important decisions, often leading to feelings of alienation and inferiority.<sup>2</sup>

### SO, WHAT IS SOCIAL INCLUSION?

*How we improve the terms for individuals and groups to take part in society.*

*How we improve the ability, opportunity, and dignity of people, disadvantaged on the basis of their identity, to take part in society.*

*Promoting social inclusion must also involve the concerted effort to dismantle the laws, policies and institutions and discriminatory attitudes that sustain their isolation.*<sup>3</sup>

### PARTICIPATION = INCLUSION

Participation is both a process and the goal: To participate and influence decisions that affect your life is an empowering process. It builds confidence and cultivates a sense of agency and voice. Simultaneously, through this process of participating and influencing, marginalized groups can affect the attitudes, norms, institutions and policies that drive social exclusion in the first place, leading to long-term structural changes and reversal of their excluded status.

### HERE ARE SOME PRE-CONDITIONS FOR AN INCLUSIVE SOCIETY<sup>4</sup>

#### REFLECTION ACTIVITY

**CONSIDER HOW THESE PRE-CONDITIONS RELATE TO THE INNOVATION FOR CHANGE HUB.**

As regional platforms representing the interests of 100s of civil society organizations and other actors, consider how your Hub can embody these principles of inclusion and diversity:

- *Do your Hub's communications currently promote positive narratives of an inclusive society?*
- *How can the Hub help to ensure equal access to information by translating information into accessible formats and in other languages?*
- *How can the Hub's promote a culture that celebrates cultural diversity?*
- *What are some other inclusion-promoting strategies the Hubs could devise?*

<sup>1</sup>Jo Beal & Laure-Hélène Piron (2005), DFID Social Exclusion Review: <https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/2301.pdf>, accessed 28/06/2018

<sup>2</sup>UNESCO (2015), An indicative review of UNESCO's work on social inclusion: A UNESCO-ODI study of promising practices in the field of social Inclusion, Page 14. <http://unesdoc.unesco.org/images/0024/002431/243129e.pdf>

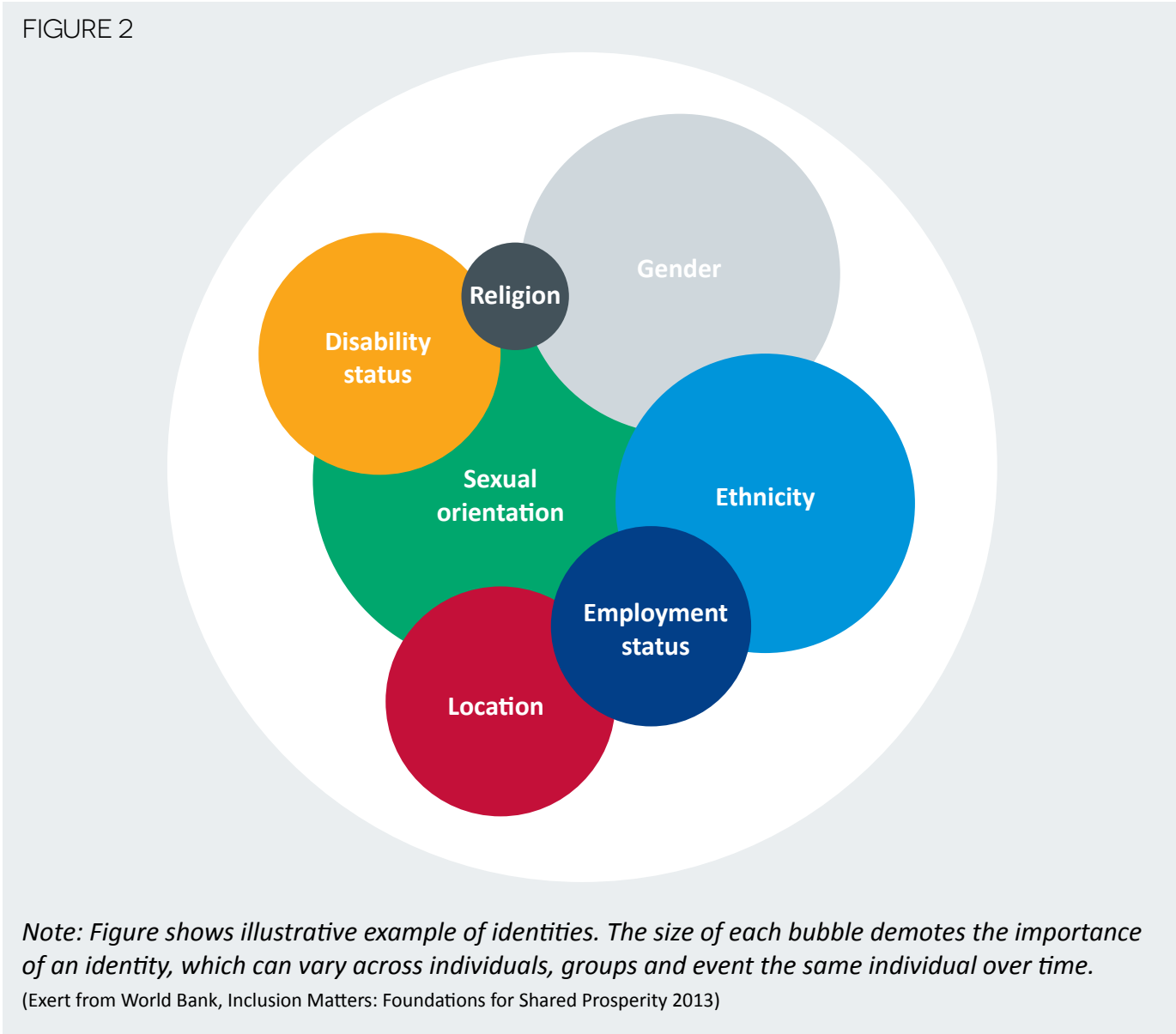
<sup>3</sup> Ibid, page 2.

<sup>4</sup>UN DESA (2009), Creating an Inclusive Society: Practical Strategies to Promote Social Integration: <http://www.un.org/esa/socdev/egms/docs/2009/Ghana/inclusive-society.pdf>



WHAT IS INTERSECTIONALITY?

Intersectionality is an analytical tool for understanding and responding to the ways in which gender intersects with other social characteristics and contributes to different experiences of oppression and privilege.



Every one of us has multiple identities. People are members of more than one group at the same time and so can experience oppression and privilege simultaneously – for example, the doctor who is respected in her profession but suffers domestic violence at home.<sup>5</sup>

Taking an intersectional approach is an important tool in the programming toolbox. Just as gender-blind programming is likely to fail, so are blunt instruments that slot people into simple categories like “poor”, “young”, “rural”, “lesbian”, “gay”, “afro-descendant”, or, indeed, “women” vs “men”.

There is an intersectional analysis tool in section three of this toolkit that can support you in your work. As a first step, please take self-reflection activity below, along with other Hub staff. This activity explores allows you to explore your personal experiences of privilege and oppression to help guide you in your work with marginalized and oppressed groups.

<sup>5</sup>The ActionAid Gender Equality & RBA Resource Kit (2006), Power, Inclusion & Rights Based Approaches: [http://www.actionaid.org/sites/files/actionaid/gender\\_equality\\_resource\\_kit\\_-\\_2006.doc](http://www.actionaid.org/sites/files/actionaid/gender_equality_resource_kit_-_2006.doc)  
<sup>6</sup>World Bank, Forward of Inclusion Matters: The Foundation for Shared Prosperity: [http://siteresources.worldbank.org/EXTSOCIALDEVELOPMENT/Resources/244362-1265299949041/6766328-1329943729735/8460924-1381272444276/InclusionMatters\\_AdvanceEdition.pdf](http://siteresources.worldbank.org/EXTSOCIALDEVELOPMENT/Resources/244362-1265299949041/6766328-1329943729735/8460924-1381272444276/InclusionMatters_AdvanceEdition.pdf)

TEAM ACTIVITY:

**PURPOSE:** In order to work with marginalized groups, requires self-awareness of your own identity, how experiences of privilege, oppression and power intersect personally for you. These experiences shape our values, our capacity to understand issues and potential biases we could unconsciously hold.

Please note that this exercise is not meant to make anyone feel guilty or ashamed of his or her privilege or lack of privilege. Rather, the exercise seeks to highlight the fact that everyone has both sites of privilege and oppression. By understanding this, we can recognize ways that we can use our privileges individually and collectively towards social justice.

INSTRUCTIONS:

Hand out a copy of the privilege questionnaire to each of your colleagues [See appendix 1 of this toolkit]

1. Give them 10 minutes to complete the questionnaire.
2. Next, invite participants to reflect on their experience of completing the questionnaire:
  - What does it mean for us to have multiple, intersecting identities—where we experience some privileges (around some identities) AND some oppression (around others)?  
\_\_\_\_\_  
\_\_\_\_\_
  - Do you think that the privilege and oppressions you noted on your personal questionnaire, are all obvious to your colleagues?  
\_\_\_\_\_  
\_\_\_\_\_
  - What insight can this give us into assumptions we make about others?  
\_\_\_\_\_  
\_\_\_\_\_
  - Were there identities (systems of privilege or oppression) that were not represented here today?  
\_\_\_\_\_  
\_\_\_\_\_
  - Do you think there are certain privileges that a majority of you share in the room?  
\_\_\_\_\_  
\_\_\_\_\_
  - What does the collective privilege mean for our work in this organization?  
\_\_\_\_\_  
\_\_\_\_\_

Wrap up with the following points:

1. It is possible to experience both privilege and oppression in different aspects of our lives, depending on our individual identities.
2. Poverty and exclusion are not the same. In some societies, even the rich can be excluded, as might be the case with wealthy homosexual men in some African countries. For example, the protest movements in the Middle East have been fueled in part by demands among middle-class citizens for greater inclusion in public decision making and accountability from political leaders.<sup>6</sup>

This privilege exercise is based on an exercise by: Gerakina Arlene Sgoutas and colleagues, Metropolitan State College; Denver, CO | Brenda J. Allen, [Differencematters.info](http://Differencematters.info)

# SECTION 2:

## WHO IS EXCLUDED?



Section 2 will focus on some historically excluded key groups and current global trends around their exclusion. This is followed by an exercise that the Hubs can undertake to contextualize to their own contexts, considering what are the unique cultural-political-social trends that shape their experiences.

*NOTE: It is recommended that each Hub also undertakes the comprehensive gender and social inclusion analysis (section 3) in order to methodically identify the priority populations, informed by data and analysis.*

### WHO ARE WE TALKING ABOUT?

As discussed in section 1, social exclusion has multiple dimensions and the experience of exclusion unique to the individual, based on their own unique identity(ies).

However, exclusion can also be said to have some universal characteristics. Regardless of which country or region you work in, age, sex, disability, race, ethnicity, religion, migration status, socioeconomic status, place of residence, and sexual orientation and gender identity, have all been grounds for social exclusion over time.<sup>1</sup> These same groups have restricted access to civic and political life. This disadvantage is heightened where multiple or intersecting grounds of discrimination are involved.<sup>2</sup>

### INDIVIDUALS, IDENTITIES OR GROUPS?

It is helpful to differentiate between:

- Individuals who are members of a particular group, they may share values, beliefs, and act as a community. A religion or ethnic group are relevant examples.
- Individuals who share characteristics with a group, but do not necessarily identify as a member of that group. In fact, they may not have much in common besides the discrimination they face. An example of this would be persons who have a disability or individuals who belong to a particular age category.

For the purposes of this toolkit and for ease of reference, we refer to both types of identities as “groups” going forward.

<sup>1</sup>UN DESA (2016), Report on the World Social Situation, Leaving No One behind: The Imperative for Social Inclusion, page 18.  
<sup>2</sup>See, for example, A/HRC/13/23, para. 56; Committee on the Elimination of Discrimination against Women, General Recommendation No. 28 (2010), para. 18; and Committee on the Elimination of Racial Discrimination, General Recommendation No. 25 (2000).

### SEXUAL ORIENTATION/IDENTITY

Sexual orientation and gender identity are integral aspects of our selves. Despite this, LGBT groups were the target of state sponsored violence and homophobia in 2017. It is critical the LGBT community have the legal rights and space to actively participate in the civil society of their own country.

“I APPEAL TO ALL GOVERNMENTS AND SOCIETIES TO BUILD A WORLD WHERE NO ONE HAS TO BE AFRAID BECAUSE OF THEIR SEXUAL ORIENTATION AND GENDER IDENTITY.”

UN SECRETARY-GENERAL ANTÓNIO GUTERRES

### RESPECTFUL LANGUAGE<sup>3</sup>

It is important to recognize that LGBT doesn’t represent one homogenous population. Each group that constitutes the LGBT community is uniquely different:

**Gender identity** A person’s internal sense of being a man/male, woman/female, both, neither, or another gender.

**Lesbian** describes a woman who is emotionally and sexually attracted to other women.

**Gay** describes a person who is emotionally and sexually attracted to people of their own gender. It can be used regardless of gender identity but is more commonly used to describe men.

**Bisexual** A sexual orientation that describes a person who is emotionally and sexually attracted to people of their own gender and people of other genders

**Transgender** Describes a person whose gender identity and assigned sex at birth do not correspond. Also used as an umbrella term to include gender identities outside of male and female. Sometimes abbreviated as trans.

*\*\*You may also come across the acronym **LGBTIQ** – the I represents ‘inter-sex’ and Q represents ‘questioning’.*

### CURRENT BARRIERS TO LGBTIQ’S PARTICIPATION IN CIVIC AND POLITICAL LIFE

**Same-sex relationships are criminalized in 72 countries and territories, with the death sentence implemented in eight countries.<sup>4</sup>**

While it is important to point out here there has been positive signs with a number of countries legalizing gay marriage including Colombia, Mexico, and positive first signs of progress in Kenya

**There are barriers to LGBT forming NGOs, including establishment or registration in 25 states.<sup>5</sup>**

In fact, in many restrictive regimes, LGBT CSO’s are pushed underground, while larger organizations may shy away from advocating on LGBT human rights issues

**A growing trend of state sponsored violence & homophobia globally.**

In 2017, this was marked by arbitrary arrests, state-sponsored discrimination, and violence against LGBT people.<sup>6</sup>

**Systemic attacks LGBT Human Rights Defenders.**

Human rights defenders working to combat violence against LGBT groups face multiple and aggravated forms of violence and discrimination.

<sup>3</sup>National LGBT Health Education Center, Glossary of LGBT Terms for Health Care Teams: [www.lgbthealtheducation.org/wp-content/uploads/LGBT-Glossary\\_March2016.pdf](http://www.lgbthealtheducation.org/wp-content/uploads/LGBT-Glossary_March2016.pdf), accessed 21/06/2018

<sup>4</sup>ILGA (May 2017), Sexual Orientation Laws in the World Overview: [www.ilga.org/downloads/2017/ILGA\\_WorldMap\\_ENGLISH\\_Overview\\_2017.pdf](http://www.ilga.org/downloads/2017/ILGA_WorldMap_ENGLISH_Overview_2017.pdf)

<sup>5</sup>ILGA (May 2017).

<sup>6</sup>Human Rights Watch, The World Report 2018 (Events of 2017): [www.hrw.org/sites/default/files/world\\_report\\_download/201801world\\_report\\_web.pdf](http://www.hrw.org/sites/default/files/world_report_download/201801world_report_web.pdf)

KEY QUESTIONS

What are the overall status of the LGBT community in your country or region?

How does existing societal knowledge, beliefs and perceptions impact the LGBT communities’ ability to participate in civil society?

Are there discriminatory policies or cultural beliefs and practices at national or local levels against persons within the LGBT community that limit their interaction and engagement in civil society?

Does the LGBT community actively participate in civil society or are they forced to work underground due to discriminatory legislation and cultural views?

If they are currently participating, what type of CSO’s do persons within the LGBT community mostly participate (associations, NGOs, community groups and so forth)?

Do NGO’s or civil society organizations in your region currently support the LGBT community with key issues or human rights violations they experience?

What support services could help to enhance LGBT communities’ participation in civil society?

Are there significant differences to the above questions if we are talking about males compared to females in the LGBT community? What about different ages?

For a more in-depth analysis of LGBT rights and freedoms in your region/country, refer to the Council of the European Union’s checklist is available as an appendix 2, in the back of this toolkit.



DIVERSE YOUTH POPULATIONS

“A YOUNG PERSON’S ABILITY TO EFFECTIVELY ENGAGE RELIES HEAVILY ON THE SOCIOECONOMIC AND POLITICAL ENVIRONMENT IN WHICH THEY LIVE...A LACK OF DECENT JOBS, LIMITED ACCESS TO LABOUR RIGHTS AND SOCIAL SERVICES, HAVE LONG-TERM NEGATIVE CONSEQUENCES ON A YOUNG PERSON’S LIFE-LONG ABILITY TO ENGAGE.”<sup>7</sup>

RESPECTFUL LANGUAGE

Young men and young women make up a diverse and heterogeneous group. Unlike other groups, they constitute a majority. The experience of ‘being young’ varies enormously across regions and within countries:<sup>8</sup> While the UN’s definition of youth is 15-24, there are regional variations. For example, the African Union categorizes youth as being up to 35 years. Due to the “youth bulge” there has been increasing policy focus and interest in young people, however policy and programs have failed to take into consideration the nuanced and complex experiences of male and female youth, urban and rural youth, regional disparities, as well as how educational attainment and access to assets shapes their experience.

4 BARRIERS TO YOUNG PEOPLE’S PARTICIPATION IN CIVIC AND POLITICAL LIFE:

- With nearly 50% of the developing world’s population is now youth and children<sup>9</sup>, there is a demographic imperative to involve young people in civil society processes.
- Young people and adolescents currently make up 33% of the world’s displaced population.
- Discriminatory social norms, negative attitudes as well as a lack of confidence and technical skill all hinder meaningful participation.<sup>10</sup>
- Legal barriers also exist: In many countries, you must be 25 years or higher to be eligible for national parliament.<sup>11</sup>

<sup>7</sup>UN DESA, UN World Youth Report on Civic Engagement, Executive Summary: [www.unworldyouthreport.org/images/docs/wyr\\_civic\\_engagement\\_executive\\_summary.pdf](http://www.unworldyouthreport.org/images/docs/wyr_civic_engagement_executive_summary.pdf) accessed 29/06/2018  
<sup>8</sup>UNESCO, [www.unesco.org/new/en/social-and-human-sciences/themes/youth/about-youth/](http://www.unesco.org/new/en/social-and-human-sciences/themes/youth/about-youth/) , accessed 21/06/2018  
<sup>9</sup>World Bank, [www.blogs.worldbank.org/opendata/chart-how-worlds-youth-population-changing](http://www.blogs.worldbank.org/opendata/chart-how-worlds-youth-population-changing) , accessed 19/06/2018  
<sup>10</sup>Restless Development & ODI, Partners for Change in a Post-2015 World, [www.restlessdevelopment.org/file/partners-for-change-young-people-and-governance-in-a-post-2015-world-pdf](http://www.restlessdevelopment.org/file/partners-for-change-young-people-and-governance-in-a-post-2015-world-pdf), page  
<sup>11</sup>Restless Development, [www.restlessdevelopment.org/youth-led-accountability](http://www.restlessdevelopment.org/youth-led-accountability) , accessed 19/06/2018



KEY QUESTIONS

What are the age demographics of the country/regions population?

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What is the unemployment rate of your country/region amongst youth?

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What categories of youth are present in your country/region (rural/urban, educated/illiterate, ethnic minority/refugee youth, religious minorities etc).

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How do the different categories of youth access information and resources? Are there barriers that may impact their full participation in civil society? How is this different for male or female youth?

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Does the legal framework directly or indirectly make it harder or easier for diverse youth to engage in civil society actions?

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What are the barriers to different categories of youth fully participating in civil society, i.e. joining meetings, participating in discussion at meetings, attending training courses, networking and so forth?

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What are some of the time and labor commitments that affect engagement within civil society? Is this different for young men and young women?

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How does existing societal knowledge, beliefs and perceptions impact the different categories of youth, and their ability to participate in civil society?

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In which type of CSO do populations of various age groups mostly participate (associations, NGOs, community groups and so forth)?

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Are NGOs and civil society currently catering to the diversity of youth in your country/region (ie. different age groups, LGBT youth, young men and young women etc)?

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What support services could help to enhance young people’s participation in civil society? What services are needed to target young men and young women differently?

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“THE PARTICIPATION OF PERSONS BELONGING TO MINORITIES IN PUBLIC AFFAIRS AND IN ALL ASPECTS OF THE POLITICAL, ECONOMIC, SOCIAL AND CULTURAL LIFE OF THE COUNTRY WHERE THEY LIVE, IS IN FACT ESSENTIAL TO PRESERVING THEIR IDENTITY AND COMBATING SOCIAL EXCLUSION.”<sup>12</sup>

Sexual orientation and gender identity are integral aspects of our selves. Despite this, LGBT groups were the target of state sponsored violence and homophobia in 2017. It is critical the LGBT community have the legal rights and space to actively participate in the civil society of their own country.<sup>13</sup>

RESPECTFUL LANGUAGE

**Indigenous Peoples** are a culturally distinct society and peoples. The UN recognizes the difficulty in defining such a diverse group of people, and instead looks to certain characteristics such as a distinct social, economic and political system and strong links to territories and surrounding natural resources. In some countries, there may be preference for other terms including tribes, first peoples/nations, aboriginals, ethnic groups, adivasi, janajati. Because the term “indigenous” has negative connotations, some people may choose not to reveal or define their origin.<sup>14</sup>

**Ethnic Minorities** Ethnicity is considered to be shared characteristics such as culture, language, religion, and traditions, which contribute to a person or group’s identity.<sup>15</sup> While a minority group can be understood as any group of people who, because of their physical or cultural characteristics, are singled out from the others in the society in which they live for differential and unequal treatment, and who therefore regard themselves as objects of collective discrimination.

**A useful distinction:** “Race is fundamentally a social construct. Ethnicity is a term that describes shared culture and national origin. Minority groups are defined by their lack of power.”<sup>16</sup>

<sup>12</sup>OHCHR (2010) page 12.  
<sup>13</sup>World Bank, [www.worldbank.org/en/news/feature/2016/05/11/partnering-with-indigenous-peoples-and-ethnic-minorities-through-community-driven-development](http://www.worldbank.org/en/news/feature/2016/05/11/partnering-with-indigenous-peoples-and-ethnic-minorities-through-community-driven-development), accessed June 19th, 2018  
<sup>14</sup>United Nations Permanent Forum on Indigenous Issues, Fact Sheet: [www.un.org/esa/socdev/unpfii/documents/5session\\_factsheet1.pdf](http://www.un.org/esa/socdev/unpfii/documents/5session_factsheet1.pdf), Accessed 22/06/2017  
<sup>15</sup>Lumen: Introduction to Sociology: Topic: Racial, Ethnic, and Minority Groups: [www.courses.lumenlearning.com/sociology/chapter/racial-ethnic-and-minority-groups/](http://www.courses.lumenlearning.com/sociology/chapter/racial-ethnic-and-minority-groups/) Accessed 22/06/2017  
<sup>16</sup>Ibid.  
<sup>17</sup>UN General Assembly, Human Rights Council Twenty-seventh session, June 2014: Factors that impede equal political participation and steps to overcome those challenges, Para 70

4 BARRIERS TO MINORITY GROUPS PARTICIPATION IN CIVIC AND POLITICAL LIFE

**In many countries, ethnic minorities are denied formal recognition and citizenship**  
As is the case for the Muslim Rohingya minority in Myanmar, the denial of citizenship has effectively rendered them stateless

**Persons belonging to minority groups remain underrepresented in the political and public processes and governing institutions in most countries.**<sup>17</sup>

**The refugee crises poses challenges for newly arrived ethnic minorities, that are being systematically excluded.**  
This has been received by a right-wing backlash in many European countries, against all migrants and ethnic minorities.

**Environmental Defenders, a large number of whom are Indigenous Peoples, are targeted with violence and death.**

KEY QUESTIONS

**What is the range of ethnicities are within the country/region? Are their newly arrived migrants?**

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**Who are the Indigenous Peoples of your country or region?**

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**Are there differences with how people from different ethnic groups access information and resources that may impact their full participation in civil society? What are the barriers?**

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**Are there differences among ethnic groups in terms of knowledge, beliefs and perception that will affect their awareness and level of engagement with civil society?**

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**Are there discriminatory policies or cultural beliefs and practices at national or local levels against any specific ethnic groups that limit their interaction and engagement in civil society?**

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What are the time constraints and labor commitments that affect engagement within civil society (i.e. household/family, formal work, on-farm labor)? How is this different for men and women?

Are there barriers for any ethnic group to fully participating in civil society, i.e. joining meetings, participating in discussion at meetings, attending training courses, networking? How is this different for men and women?

In which type of CSO do populations of various ethnic groups mostly participate? (Church, unions, political other?) Is this different for men and women?

Are there differences in formal decision-making rights and practices among various ethnic groups that will impact engagement in civil society?

How many ethnic minorities are represented at leadership level in civil society organizations. Is this different for men and women?

Are support services needed for various ethnic groups to participate to a greater extent within civil society? Is this different for men and women?



“THE PARTICIPATION OF PERSONS WITH DISABILITIES IN POLITICAL, PUBLIC AND SOCIAL LIFE IS CRUCIAL IN ORDER TO FIGHT STEREOTYPES, PREJUDICES AND EXCLUSION.”

15% of the world’s population lives with some form of disability.<sup>18</sup> Women comprise nearly three-quarters of all persons with disabilities in low and middle-income countries.<sup>19</sup> Those with a disability are often denied the opportunities of full participation in the activities of the socio-economic and cultural system which they are part of. This deprivation comes about through physical and social barriers, as well as discriminatory laws and practices, that have evolved from ignorance, indifference and fear. In most parts of the world there are deep and persistent negative stereotypes and prejudices against persons with disabilities, which leads to social exclusion and lack of access to civic space.

RESPECTFUL LANGUAGE

The Convention on the Rights of Person’s with Disabilities acknowledges that ‘disability is an evolving concept’ and this is true of the language that is used to describe disability. Outdated terms such as “retard” and “handicap” reinforces stigma and prejudice. Person-first terminology (ie. Persons with a disability) acknowledges that the disability is an attribute, like hair or eye color, and not the whole of the person. When in doubt, it’s always best to ask persons with disabilities or organizations for advice!

<sup>18</sup>World Health Organization (2011), World Report on Disability: [www.apps.who.int/iris/bitstream/handle/10665/70670/WHO\\_NMH\\_VIP\\_11.01\\_eng.pdf;jsessionid=55401F0FDE775E10535F8069A3342906?sequence=1](http://www.apps.who.int/iris/bitstream/handle/10665/70670/WHO_NMH_VIP_11.01_eng.pdf;jsessionid=55401F0FDE775E10535F8069A3342906?sequence=1)  
<sup>19</sup>International Foundation for Electoral Systems, [www.ifes.org/global-access-and-inclusion-how-ifes-partners-persons-disabilities-achieve-avoteforeveryvoice](http://www.ifes.org/global-access-and-inclusion-how-ifes-partners-persons-disabilities-achieve-avoteforeveryvoice) accessed: 21/06/2018



4 BARRIERS TO MINORITY GROUPS PARTICIPATION IN CIVIC AND POLITICAL LIFE

Discriminatory laws and policies prevent people with intellectual disabilities from participating in political and public life.<sup>20</sup>

It is still common across African, MENA, Latin American and Asian countries to prevent people with an intellectual disability from voting under “unsoundness of mind” provisions.

Lack of accessibility. Many built environments and transport systems are inaccessible to people with a disability, severely restricting movement.

Little information is available in accessible formats, and communication needs of people with disabilities are unmet. PwD’s may be unable to access even basic products and services such as telephones, television, and the Internet.<sup>21</sup>

Lack of comparable data, disaggregated by disability, and lack of monitoring mechanisms at the national level.<sup>22</sup>

The lack of rigorous and comparable data on disability makes it difficult to fully understand the numbers of people with disabilities and their circumstances. This also means that disability issues are not factored into policy and program design.

Disabled Persons Organisations (DPOs) require strengthening.

Partly because of sustained exclusion experienced by PwD’s, the capacity building requirements of DPO’s is sometimes greater than other civil society organizations, thus requiring additional resources and a long term commitment.

KEY QUESTIONS

What is the range of types of disabilities within the target country/region?

Is there national/regional laws & policies supporting persons with disabilities?

Are there differences for how persons with various disabilities access information and resources that may impact their full participation in civil society? What are the barriers to access?

<sup>20</sup>Inclusion International (2015), Inclusive Civic Engagement: An Information Toolkit for Families and People with Intellectual Disabilities, [www.inclusion-international.org/wp-content/uploads/2015/07/Inclusive-Civic-Engagement-Information-Toolkit.pdf](http://www.inclusion-international.org/wp-content/uploads/2015/07/Inclusive-Civic-Engagement-Information-Toolkit.pdf)

<sup>21</sup>World Health Organization (2011), page 10.

<sup>22</sup>OSCE Office for Democratic Institutions and Human Rights (2017), Persons with Disabilities and Ensuring their Right to Participate in Political and Public Life; [www.osce.org/odihr/340246?download=true](http://www.osce.org/odihr/340246?download=true) page 4.

How does societies knowledge, beliefs and perceptions around PWD’s affect their level of engagement with civil society?

Are there discriminatory policies or cultural beliefs and practices at national or local levels against persons with disabilities that limit their interaction and engagement in civil society?

What are the limitations for persons with disabilities to fully participating in civil society, i.e. joining meetings, participating in discussion at meetings, attending training courses, networking and so forth?

Do persons with disabilities have different levels of time and labor commitments (i.e. household/family, formal work, on-farm labor) that affect engagement within civil society?

Are support services needed for persons with disabilities to participate to a greater extent within civil society?

In which type of CSO do populations of persons with disabilities mostly participate (associations, NGOs, community groups and so forth)?

Are there significant differences to the above questions if we are talking about males compared to females with a disability?

Refer to Appendix 4: ‘CRPD COMPLIANCE CHECK LIST’ to check whether your country or region is compliant with the Convention on the Rights of Persons with a Disability.

# SECTION 3:

## OPERATIONALIZING GENDER & SOCIAL INCLUSION



Section Three of the toolkit guides Hub staff through undertaking a GSI analysis, before turning to how to integrate gender & social inclusion (GSI) considerations into the Hub’s programmatic cycle and activities. The following steps will be covered:

1. Undertaking a situational analysis, data review & mapping current initiatives to prioritize key marginalized groups.
2. Interrogate dimensions of their exclusion by utilizing an intersectional analysis tool.
3. Begin to integrate findings into programmatic cycle including monitoring and evaluation for inclusion.

The GSI analysis can be undertaken when designing a specific intervention, or alternatively, as part of a comprehensive planning process such as a strategic plan. The size and scope of the analysis will depend upon the scale of the planning activity (ie. whether it is activity level or strategic level). It will also depend on the resources you have to commit to the process and what data is already available: For example, significant time can be saved if you can draw upon analysis and research, already undertaken by partners and member organizations.

Once the analysis has been undertaken, it is envisaged that the Hubs can revisit this baseline of data and analysis, to inform strategic decisions and future planning going forward.

Here are some guiding principles for undertaking this analysis:

- The following section should be conducted in a highly participatory manner, involving partners and member organizations. Efforts should be made to reach marginalized groups and the design appropriate platforms for them to feed into the process meaningfully.
- Both quantitative and qualitative information should be gathered through this process, in order to gain a comprehensive understanding of exclusion within your context.
- Acknowledging the diverse contexts in which the Innovation for Change hubs operate, it may be necessary to contextualize activities and translate them into the appropriate languages.

### THE GENDER AND SOCIAL INCLUSION ANALYSIS

We can never assume that we know who is marginalized. There are specific dynamics of marginalization that are hidden and must be unpacked, in order to design effective inclusion strategies. The socio-political drivers of exclusion are always in flux, and therefore also requires interrogation.

In order to identify who are key marginalized groups, undertaking a situational analysis is key. The situational analysis will help you to establish a baseline of data (both qualitative and quantitative) to build an overall picture of who is excluded, as well as groups’ barriers and capacities to participate. To achieve this, the following steps are laid out in this section:

1. Undertake the questionnaire on the following page.
2. Review available data and gather further primary research with target groups/communities (if time permits).
3. Map current partners and members and the groups they represent, noting gaps in coverage.
4. Consider external events and trends and how they are impacting marginalization in your country/region.
5. Undertake the intersectional analysis of priority groups to identify key areas of exclusion and strategies for addressing these.

*NOTE: It is worth mentioning that the above steps constitute a ‘rapid approach’ to a situational analysis. We’ve included a list of resources (to your right) presenting a range of methodologies and approaches for undertaking a more comprehensive situational analysis.*

KEY RESOURCES FOR UNDERTAKING A SITUATIONAL ANALYSIS:  
Participatory Poverty Assessments (PPA) is a widely used tool for analyzing and addressing poverty by including voices of the poor. An intro can be found here: [www.participatorymethods.org/resource/rough-guide-ppas-participatory-poverty-assessment-introduction-theory-and-practice](http://www.participatorymethods.org/resource/rough-guide-ppas-participatory-poverty-assessment-introduction-theory-and-practice)  
ActionAid’s Power: Elite Capture & Hidden Influence, deals with power as the source of marginalization and provides a number of tools for analyzing power and formulating strategies for collective action: [www.actionaid.org/sites/files/actionaid/final\\_power\\_double\\_page\\_spread\\_march\\_2012.pdf](http://www.actionaid.org/sites/files/actionaid/final_power_double_page_spread_march_2012.pdf)  
DFID’s Gender and Social Exclusion Analysis Practice Paper (2009), provides a useful step by step guide for undertaking DFID’s analysis: [www.gsdrc.org/docs/open/se9.pdf](http://www.gsdrc.org/docs/open/se9.pdf)  
The Canadian Government’s Gender Based Analysis + is a tool used to assess how diverse groups of women, men and gender-diverse people may experience policies, programs and initiatives: [www.swc-cfc.gc.ca/gba-acsr/resources-ressources-en.html](http://www.swc-cfc.gc.ca/gba-acsr/resources-ressources-en.html)

### UNDERTAKING THE QUESTIONNAIRE

Consultation with civil society actors (both existing HUB members and beyond) is a key component in undertaking your GSI analysis – conversations with marginalized groups can help to validate your findings from the data review, as well as to reveal dimensions that might not feature in official reporting.

#### ACTIVITY

THE FOLLOWING ACTIVITY EXPLORES KEY DOMAINS OF EXCLUSION, INCLUDING THE STATE, SOCIETY AND THE MARKET.

1. Use the questionnaire below to guide a facilitated discussion with key organizations, groups and civil society leaders.
2. If time is limited, split the group into four teams, asking them each to lead on a section of the questionnaire (Society, The State and the Market).
3. Laptops with internet should be made available, to help assist the groups in collecting data and information, to support their findings.
4. Give each group one hour to research and document their findings, before presenting back to the wider groups.

*It is worth pointing out that the following is not a exhaustive list of questions: you may want to include other areas of inquiry, that are specific to your particular context or the thematic area you are researching!*



## SOCIETY

### Which social groups are poor and/or socially excluded and why?

## Are some groups of poor people considered 'undeserving'?

**Are excluded groups and the poorest and most vulnerable concentrated or over-represented in particular locations (such as remote or isolated areas, urban slums)? Do people located in particular geographical locations experience particular forms of exclusion or discrimination?**

### Which social groups are poor and/or socially excluded and why?

## Are some groups of poor people considered 'undeserving'?

### What is the status of migrants, refugees and/or internally displaced people?

**Are excluded groups and the poorest and most vulnerable concentrated or over-represented in particular locations (such as remote or isolated areas, urban slums)? Do people located in particular geographical locations experience particular forms of exclusion or discrimination?**

**NOTES:**

This image shows a full page of blank handwriting practice paper. It features ten evenly spaced horizontal red lines across the entire width of the page, providing a guide for letter height and placement. The background is plain white, and there are no margins, text, or other markings present.

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**To what extent does civil society represent the interests of all social groups? Does civil society represent and reach people who live in all regions, remote areas and urban slums?**

**Do women's organisations operate at local and national levels? Are there strong linkages between grass-roots and national organisations?**

**Is there a disability movement of any description? Are disabled people able to represent themselves in Disabled People's Organisations or do non-disabled people lead on disability issues?**

### Are men involved in organised action on gender issues?

### Do organisations want to engage in formal political systems or separate from them?

**Does the media play a role in challenging or reinforcing existing social norms and discrimination?**

**Does civil society facilitate links between government and citizens in such a way that increases the voice and involvement of women and excluded people?**

**Is there adequate space for CSOs to hold government accountable for equitable delivery of services and fulfilment of human rights for all groups?**

**Are there any groups who do not (or cannot) register births?**

**Are some groups disadvantaged or excluded from official information and processes by language?**

**Do people living in all regions, in remote areas and in urban slums enjoy equal citizenship rights by law and in practice?**

**What international human rights conventions have been signed, ratified and reflected in national laws?**

**Are there discriminatory clauses in constitutional, statutory and customary law?**

To what extent does the law give men and women, or members of particular social groups, different individual and family rights (for example when voting, requesting a divorce, securing child custody, or obtaining individual identity cards or a passport)?

**To what extent does the legal system protect property rights for women and different social groups?**

**How equal, secure and affordable is the access to justice of people of different genders, ages and social identities? What rights and protections do justice systems offer to children?**

### What are the laws and norms that affect the rights of divorced or widowed women?

**What legislation exists on violence against women? To what extent is this legislation implemented?**

**NOTES:**

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**Do different genders, age and social identities have access to land and ownership of other productive resources?**

### What is the distribution of income and wage gaps across different groups?

**What are the opportunities and barriers to migrating for work locally, nationally or internationally; temporarily or permanently; for different genders & social identities?**

- access to and use of credit;
- inclusion and access to getting a bank account;
- collecting payments and paying bills.

- **business services; (IT, lawyers, shipping and logistics)**
- **Access to customers and suppliers;**
- **small scale entrepreneurship;**
- **opportunities to trade and sell.**

**NOTES:**

This image shows a blank sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

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Using the results identified in the questionnaire activity, you can begin to research and build evidence around the key groups the team identified and to further investigate areas where there was a knowledge gap.

- Program and project documents from civil society and NGOs.
- Research undertaken by universities and research institutions
- Statistical reports from government departments and agencies such as the World Bank or UN Agencies.

- Community level Data** Online maps are a good example of this. For example, websites that empower the community to map incidences of crime have helped to increase security.

**Corporate Data** companies such as Vodafone (or the relevant mobile phone provider) have data available on millions of people.

## MAP YOUR PARTNERS AND MEMBERS COVERAGE

Begin by mapping each of your partner/members, the communities and groups they work with and the scope of their coverage. Consider whether in their coverage, whether they are reaching intersecting identities or if they have capacity to do so.

This process should illuminate any glaring gaps in your current coverage. Which marginalized groups are not currently present? From here, you may begin to research how to reach these excluded groups.

KEY GROUP	Partner organization	Level of working: Local, national, regional.	Key groups targeted	Programs/ initiatives that target these group(s)	Specific expertise
EG. PWD	The Pacific Disability Forum	National level - the peak body of DPOs.	All disabilities Disabled women Disabled youth	Advocacy Research Capacity Development	Monitoring the implementation of the CRPD.

RESOURCES FOR PARTICIPATORY DATA COLLECTION:

Restless Development, ACTION RESEARCH: How a group of young people did it in Napak and Moroto in Karamoja, Uganda: [www.restlessdevelopment.org/file/strength-creativity-and-livelihoods-of-karimojong-youth-method-paper-low-pdf](http://www.restlessdevelopment.org/file/strength-creativity-and-livelihoods-of-karimojong-youth-method-paper-low-pdf)

Participatory Learning and Action: IED's new online archive collects four decades of learning and experience documented in the Participatory Learning and Action (PLA) [www.iied.org/explore-pla-archive](http://www.iied.org/explore-pla-archive)



CONSIDER EXTERNAL EVENTS AND EMERGING THREATS WITHIN YOUR CONTEXT

The marginalization of certain groups is often a political tool used by oppressive regimes. For example, currently of right-wing parties in Europe are ramping up exclusionary language against historically persecuted groups such as the Roma and Jewish. This can be understood, partly by the populist backlash in response to the refugee crises in Europe.

Consider emerging socio-political trend in your region. How is it impacting on marginalized groups? Are there new migration patterns, new emerging populist movements or the passing of discriminatory laws that target a specific group? New emerging

EXPLORING THE ROOT CAUSES OF EXCLUSION

At this stage in the process, we begin to hone in on a key group or groups that has been identified as priority for the Hubs.

In order to design effective programs to address exclusion, understanding the multiplicity of exclusions and the socio/political/cultural dynamics around this is key. On the next page, you will find an ‘intersectional analysis tool’ presenting a number of key domains where already marginalized groups confront intersecting and multiple forms of discrimination. Applying these intersectional lenses, will help you to gain a more comprehensive picture of the individual or groups experience.

**ACTIVITY**

**INTERSECTIONAL ANALYSIS OF KEY GROUPS.**

The next step is to undertake an analysis of the key group(s) that are priority for your hub. This exercise will enable you to identify the specific political, social and cultural dynamics that are specific to your region or country.

*PREP: In order to undertake this analysis, first convene a group that consists of activists and organizations that represent the key group(s) you are focusing on.*

*STEP 1: Select a key group that you have identified as priority for the Hub.*

*STEP 2: Now turn to Appendix 3 in the toolkit to find the intersectional analysis tool template. Proceed by undertaking full intersectional analysis of your Key Group(s). Don't forget to refer back to the key questions in section 2, to help you consider the multiple dimensions of the key groups access to civil society.*

*STEP 3: Note which areas require further research and analysis and delegate this work amongst your team.*

*STEP 4: Once you have undertaken the full analysis and filled in your research gaps, you can begin to consider how to integrate these considerations into the design process of your programs and activities, which is the next step in the toolkit.*

INTERSECTIONAL ANALYSIS TOOL



In most societies, strong cultural norms exist around how men and women behave, the activities they undertake, and the qualities they exhibit. Gender norms and beliefs are often reflected in laws, policies, and institutional practices. Gender will often intersect with other areas of exclusion. For example: A disabled woman may encounter multiple levels of discrimination, first for her disability and secondly, because of her gender.



Not all groups receive equal treatment and protection under the law. Discriminatory laws and policies often have the effect of formalizing their exclusion and marginalization. For example: consider how gay relationships are banned in many countries or how some ethnic minorities are denied citizenship or formal recognition by the State.



Financial assets derive from having decent employment or a livelihood, and a stable source of income. Being able to access to credit, as well being able to access social safety nets, for example, social insurance and pensions are all financial assets.



Technology today provides us with unparalleled amounts of information. With much of civil society organizing online, access to technology is often a key way that citizens participate. The ‘digital divide’ means there is growing inequality between those who have access to ICT and those who do not. For example: consider how some are excluded from ICT, especially the rural poor or People with a Disability.



Educational attainment impacts on one’s ability to participate in the labor market and well as civil society. Policy processes are often overly technical and exclude those who do not have tertiary education. Low educational attainment is characteristic of historically marginalized groups.



Access to Information is a fundamental prerequisite for citizen participation: information allows them to participate in priority setting and decision-making, to hold their government accountable, and to assure equal treatment and equal justice. For example: Consider those who cannot access information, including the visually impaired or those who do not speak the national language.



Poor and marginalized people are most vulnerable to the adverse impacts of climate change. Forced migration, loss of livelihoods increased risk of conflict, are all outcomes of climate change. For example: Consider how subsistence farmers or those who live in climate- prone regions such as the Pacific Island Countries are disproportionately affected.



How we spend our time is often prescribed by our gender and expectations around our roles and responsibilities in personal and public life. For example: women undertake significantly more unpaid care work than men for children and other family members. Other responsibilities might include manual labour, farming, as well as roles in the community.



Rural and regional populations generally have less access to services, poor infrastructure and higher levels of poverty. Consider also that the majority of civil society operations take place in major cities and hubs, often excluding citizens from regional and rural localities.



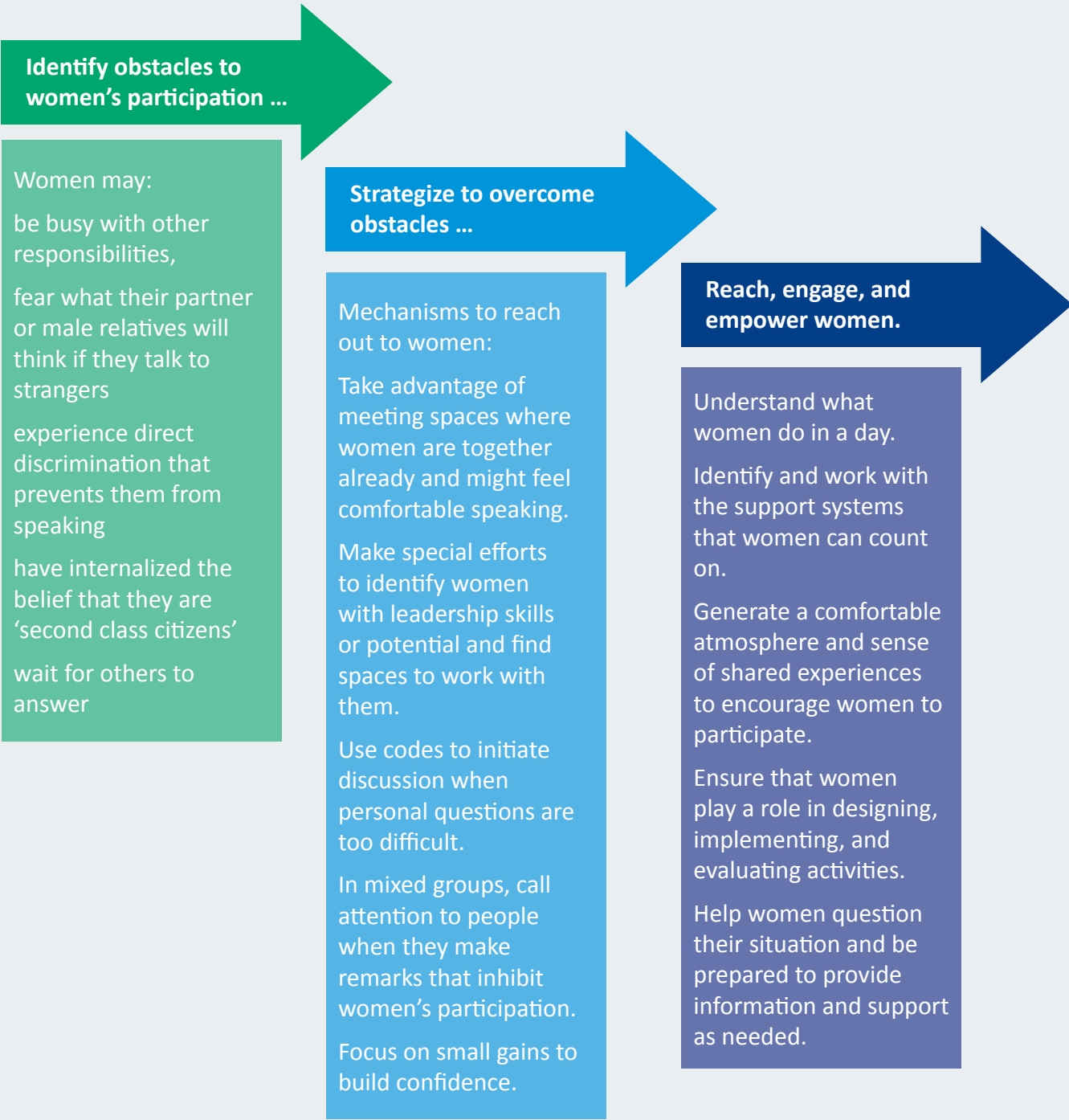
Your social status and whether you belong to a marginalized group, impacts on your capacity to decide, influence, and exercise control; It also impacts whether you can vote or run for office at all levels of government. For example: consider which groups currently dominate decision-making positions and who exercises voice in decisions made by public, private, and civil society organizations.

Adapted from USAID’s gender analysis tool, Integrating Gender Equality and Female Empowerment in USAID’s Program Cycle: [www.usaid.gov/sites/default/files/documents/1870/205.pdf](http://www.usaid.gov/sites/default/files/documents/1870/205.pdf), Page 11.

INTEGRATING GSI CONSIDERATIONS INTO PROGRAM DESIGN

Here’s a useful flowchart with steps on how to overcome barriers & obstacles through considered program design. While this example is focused on women’s empowerment, these three steps are relevant to any key group you are targeting in your programs. Complete the below activity with your team and apply these steps to your Hub’s activities!

ENGAGING WOMEN IN COMMUNITY PROCESSES



ACTIVITY

1. In this previous intersectional activity, you will have identified some of the barriers to participation for key group(s) the Hub wants to target. Return to this work, noting the key obstacles you know will be key for engaging them in your program/activity.
2. Next, begin to strategize how to overcome obstacles – when reaching out to this group consider things like, what is the best mode of communication - are they online? Where does this group generally meet? What existing orgs do they participate in? What are the socio-cultural barriers that you will need to navigate?
3. It might take some time before you achieve the next step of “empowerment”. For now, consider where do you want to get to with this group. Formal membership in the Hub? Co-creating a campaign? Once you have figured out the long-term objectives, you can begin to identify some first steps to getting there.



The flowchart above is an exert from ActionAid’s Power, Inclusion and Rights – Rights Based Approaches The ActionAid Gender Equality and RBA Resources Kit (2006).



NOW, HERE ARE SOME KEY CONSIDERATIONS/QUESTIONS ACROSS EACH STAGE OF THE PROGRAM CYCLE:



AN ILLUSTRATIVE PROGRAM ON STRENGTHENING LGBT VOICE AND ORGANIZATIONS:

PROGRAM DESIGN PHASE
Inclusion of diverse LGBT organizations and movements in initial consultations.
Baseline data collected around those key issues identified through the consultation process.
Data is validated by organizations and movements, identification of key issues/themes.
Co-design of the programmatic objectives and Theory of Change
KEY PROGRAMMATIC OBJECTIVES & ACTIONS IDENTIFIED
Objective 1: Strengthening the capacity of LGBTI leaders and civil society organizations
Objective 2: Training LGBTI leaders to effectively participate in democratic processes and run organizations
Comprehensive mapping of all existing LGBT orgs and actors, including lesbian, trans and other sexual identities.
Grants program launched aimed at enhancing sustainability of LGBT movements and organizations
LGBT groups and leaders included in civil society strengthening programs
Capacity building activities with LGBT organization to enhance advocacy at national and regional levels
Support cross-movement collaborations through Hub advocacy initiatives
Support the formation of national and regional LGBT networks and coalitions
Advocate to donors and philanthropists to directly fund LGBT orgs and movements
ILLUSTRATIVE INDICATORS
<ul style="list-style-type: none"><li>• Number of LGBT groups actively involved in broader civil society</li><li>• Number of LGBT groups with full membership in selected civil society coalitions and platforms</li><li>• Number of LGBT organizations and leaders trained in advocacy skills</li><li>• Number of policy changes as a result of LGBT national and regional level advocacy</li><li>• Number of new LGBT groups in formation or formally registered throughout the country</li><li>• Number of new LGBT groups that are financially sustainable</li><li>• Number of new grants announced targeting LGBT groups.</li></ul>

Adapted from USAID’s Toolkit for integrating LGBT rights activities into programming in the E&E Region (2014). Also, see SIDA’S LGBT Global Development Partnership: [www.sida.se/globalassets/global/nyheter/lgbti-global-development-partnership-fact-sheet\\_final\\_160622.pdf](http://www.sida.se/globalassets/global/nyheter/lgbti-global-development-partnership-fact-sheet_final_160622.pdf)

MEASURING FOR INCLUSION

A note about Disaggregated Data!

Disaggregation is the collection and presentation of data on specific groups and areas of exclusion including men/women, disability, geographic locate and more.

Collecting and analyzing disaggregated data can be a powerful tool to take an in-depth, comparative look at inequalities, across groups, time and place. While it is increasingly common to see sex disaggregated data (M/F), since the SDGs there has been a greater push to collect data disaggregated by income, gender, age, race, ethnicity, migratory status, disability, geographic location and other characteristics relevant in national contexts.

Below is a summary of data disaggregation required across SDG 1 (no poverty), SDG 2 (zero hunger) and SDG 3 (good health and well-being).

	SDG1				SDG2			SDG3						
Target number	1.1	1.2	1.3	1.b	2.1	2.2	2.3	3.1	3.2	3.3	3.5	3.7	3.8	3.a
Age		x	x	x	x	x			x	x	x	x		x
Sex		x	x			x	x	x	x		x			
Employment			x											
Poverty levels				x	x								x	
Disability			x											
Vulnerable population									x				x	
Indigenous status							x							
Rural/Urban	x													

Analysis undertaken by the International Institute for Sustainable Development, available here: [www.iisd.org/blog/disaggregated-data-essential-leave-no-one-behind](http://www.iisd.org/blog/disaggregated-data-essential-leave-no-one-behind)

ACTIVITY

Think of an existing activity or program of the Hub, that you consider to be currently blind to gender and social inclusion. The program or activity you select should demonstrate some relevance for marginalized group(s) the hub wants to reach. Now work through the following questions?

How does this program intersect with the concerns or issues with the key group(s) you have identified as a Hub?

How could this program’s current blindness to GSI considerations, potentially cause unintended harm to the group(s) identified?

What opportunities are there to include this group(s) into this existing Hub program or activity?

How could this program contribute to achieving positive change for this key group, such as addressing the discriminatory laws or practices?

What are some potential risks in involving this key group(s) in your program or activity?

How would you go about getting this key group on board with this program. Do you foresee any challenges, and if so what would they be?

**CASE STUDY:**

**INCLUSIVE DATA CHARTER**

The Inclusive Data Charter is part of the 2030 Agenda’s aspiration of leaving No One Behind. between now and 2030, the charter intends to help to spur countries to accelerate action on data disaggregation, and encourage all actors to do the same, including civil society organizations.

Using more granular disaggregated data is important in shining a light on groups that are frequently excluded, to understand how they experience marginalization and where progress is happening or not happening.

**PRINCIPLE ONE:** All populations must be included in the data.

**PRINCIPLE TWO:** All data should, wherever possible, be disaggregated in order to accurately describe all populations.

**PRINCIPLE THREE:** Data should be drawn from all available sources.

**PRINCIPLE FOUR:** Those responsible for the collection of data and production of statistics must be accountable. Principle Five: Human and technical capacity to collect, analyze, and use disaggregated data must be improved, including through adequate and sustainable financing.

For more info: [www.data4sdgs.org/initiatives/inclusive-data-charter](http://www.data4sdgs.org/initiatives/inclusive-data-charter)



# SECTION 4:

## EMBEDDING GENDER & SOCIAL INCLUSION



The final section introduces a range of strategies and priorities for embedding gender and social inclusion (GSI) into organizational culture.

Embedding GSI into the institutional culture of an organization is a long-term endeavor. It requires leadership, significant human and financial resources as well as a long-term commitment. Adopting a strategic approach to GSI means shifting from an ad hoc approach to one that is truly transformative, with the potential to shift power structures and systems that perpetuate exclusion. The following topics will be covered in section 4:

- 1. Key areas of commitment
- 2. A sample assessment tool to identify where attention is needed
- 3. A resource list for further development and ongoing learning

### KEY AREAS OF COMMITMENT

First, here are some commitments required for embedding Gender and Social Inclusion into your Hub!

AREAS OF COMMITMENT	HOW? CONSIDER THE FOLLOWING...
Leadership	<p>The leadership team are visible champions of GSI</p> <p>GSI champions have been appointed to drive GSI at operational level.</p> <p>The composition of leadership team and governing bodies are representative of key excluded groups the Hub is targeting.</p>

Strategic thinking	<p>A long-term vision of where the Hub should be in 5 or 10 years has been agreed and these goals are included into strategic plans.</p> <p>A GSI working group have been appointed to drive implementation and hold leadership accountable to achieving goals.</p>
Resources	<p>Resources have been committed to both human and operational resources.</p> <p>GSI is built into all of your programmatic budgets.</p> <p>Resources are committed towards building GSI capacity of members and partners (including private partners).</p>
Accountability	<p>GSI goals are clearly communicated in strategic docs, the website, as well as to all of your member organizations and donors.</p> <p>There are transparent mechanisms in place to measure progress against strategic goals.</p> <p>Individuals who abuse power are held accountable, with mechanisms in place to deal with cases of discrimination.</p>

### GENDER AND SOCIAL INCLUSION ASSESSMENT TOOL

The following GSI assessment tool, is intended as a health check to assess where your Hub is in progressing GSI, and to illuminate possible areas for priority going forward. This assessment tool can be carried out in a participatory manner with key staff –those who have a good knowledge and understanding of organizational policies and processes (ie. HR), should be included. Alternatively, relevant sections of this assessment can be adapted and used as a survey and circulated amongst staff and members. This can be completed in a confidential manner, if desirable.

MEASURE	YES	NO
There are positive discrimination policies that promote the recruitment of underrepresented/ marginalized groups into leadership positions in the Hub.		
Progress on inclusion initiatives is regularly reported to the Hub’s members & partners, particularly those that are representative of key marginalized groups.		
GSI is included in job descriptions, with the majority of senior management having clear deliverables around GSI.		
There is an action plan or other directive, that articulates GSI priorities for the organization, supported by a clear M&E framework and guidelines for reporting.		
GSI is a standing item in all senior management team meetings with each team leader reporting on progress made against the plan.		
A steering committee has been formed to track progress against the plan.		
Leaders allocate the necessary resources required to achieve GSI outcomes.		
Elders, key community representatives and leaders are invited to participate in the planning meetings.		
The Hub regularly updates key data regarding inclusion, access, equity and discrimination in the target communities and tracks incidents and mounting threats to marginalized groups.		
There are adequate resources in place to ensure that inclusion strategies are fully implemented.		
Managers “walk the talk” and seek out opportunities to integrate GSI considerations into daily operations and lead their teams to do the same.		

Capacity building and training on GSI is mandatory for all staff and member organizations.		
Grievance and redressal mechanisms are in place with special mechanisms for handling sexual harassment and language/cultural/caste discrimination issues should be developed and publicized across the Hub.		
The Hub strives to ensure that its communication assets reach diverse audiences (for example, languages of marginalized groups, text msg to reach rural audiences or radio for illiterate, or those with a visual impairment).		
Marginalized voices are systematically included in consultation and civic processes.		
The Hub invests in establishing strong relationships with the orgs and groups representative of key marginalized groups.		
The Hub advocates for GSI considerations in its partnerships with corporates and other non-civil society/Innovation actors.		
Meetings and dialogues are accessible for people using wheelchair, walkers, canes, people with a visual impairment or who are hard of hearing.		
An effort is made to reach rural/regional communities, by holding either separate meetings or financing is allocated to enable key representatives to attend.		
Data is disaggregated by key groups including age/gender/location/disability and other key groups.		

This Assessment Tool has been inspired and adapted from the WASH Alliance International’s Inclusion Assessment Tool, available for download here: [www.wash-alliance.org/social-inclusion](http://www.wash-alliance.org/social-inclusion)

Once you have undertaken the above questionnaire, those that you answered ‘no’ can form the basis of some key actions going forward. Recognizing that this is a long-term process, identify realistic and achievable measures that are an obvious “next step” for your Hub.

Possible next-steps might include:

- Holding a dialogue with key marginalized groups to identify Hub priority measures.
- Identify Hub champions to help steer GSI work forward.
- Establish official position and vision on GSI
- Begin to integrate GSI key messaging as well as inclusive language on the Hub’s website and other key marketing assets.

KEY ADDITIONAL RESOURCES FOR GENDER AND SOCIAL INCLUSION

SOCIAL INCLUSION – GENERAL

Alberta Municipality, Welcoming & Inclusive Communities Toolkit: [www.auma.ca/sites/default/files/Advocacy/Programs\\_Initiatives/WIC/wic\\_toolkit\\_-\\_march\\_2\\_2015\\_2.pdf](http://www.auma.ca/sites/default/files/Advocacy/Programs_Initiatives/WIC/wic_toolkit_-_march_2_2015_2.pdf)  
UNDP, Human Development Report 2016, Human Development for Everyone: [www.undp.org/content/undp/en/home/librarypage/hdr/2016-human-development-report/](http://www.undp.org/content/undp/en/home/librarypage/hdr/2016-human-development-report/)  
Gender Equality and Social Inclusion Working Group, International Development Partners Group, Nepal, (2017) A Common Framework for Gender Equality & Social Inclusion, Nepal: [www.asiapacific.unwomen.org/en/digital-library/publications/2017/04/gesi-framework](http://www.asiapacific.unwomen.org/en/digital-library/publications/2017/04/gesi-framework)  
DFID (March 2009), A DFID Practice Paper: Gender and Social Exclusion Analysis, [www.gsdr.org/docs/open/se9.pdf](http://www.gsdr.org/docs/open/se9.pdf)

GENDER

CGIAR Research Program on Climate Change, Agriculture and Food Security (CCAFS), CARE International and the World Agroforestry Centre (ICRAF): Gender and Inclusion Toolbox: Participatory Research in Climate Change and Agriculture. [https://cgspace.cgiar.org/bitstream/handle/10568/45955/CCAFS\\_Gender\\_Toolbox.pdf](https://cgspace.cgiar.org/bitstream/handle/10568/45955/CCAFS_Gender_Toolbox.pdf)  
The ActionAid (2006) Gender Equality & RBA Resource Kit Power, Inclusion & Rights Based Approaches: [www.actionaid.org/sites/files/actionaid/gender\\_equality\\_resource\\_kit\\_-\\_2006.doc](http://www.actionaid.org/sites/files/actionaid/gender_equality_resource_kit_-_2006.doc)  
Interaction (2010) The Gender Audit Handbook A Tool for Organizational Self-Assessment and Transformation: [www.interaction.org/sites/default/files/Gender%20Audit%20Handbook%202010%20Copy.pdf](http://www.interaction.org/sites/default/files/Gender%20Audit%20Handbook%202010%20Copy.pdf)

DISABILITY

UN DESA (2016) Toolkit on Disability for Africa: [www.un.org/development/desa/technical-cooperation/2016/11/18/toolkit-on-disability-for-africa/](http://www.un.org/development/desa/technical-cooperation/2016/11/18/toolkit-on-disability-for-africa/)  
OSCE (2017), Persons with Disabilities and Ensuring their Right to Participate in Political and Public Life; [www.osce.org/odihr/340246?download=true](http://www.osce.org/odihr/340246?download=true)  
CBM, Disability Inclusive Development Toolkit (2017): [www.cbm.org/article/downloads/54741/CBM-DID-TOOLKIT-accessible.pdf](http://www.cbm.org/article/downloads/54741/CBM-DID-TOOLKIT-accessible.pdf)

MIGRATION/REFUGEES

UNESCO -Intercultural Dialogue Resources Toolbox: [www.en.unesco.org/interculturaldialogue/resources](http://www.en.unesco.org/interculturaldialogue/resources)  
OECD (2016), Making Integration Work: Refugees and others in need of protection: [www.oecd-ilibrary.org/social-issues-migration-health/making-integration-work-humanitarian-migrants\\_9789264251236-en](http://www.oecd-ilibrary.org/social-issues-migration-health/making-integration-work-humanitarian-migrants_9789264251236-en)

LGBTIQ

The Council of the European Union, A Toolkit to Promote and Protect the Enjoyment of All Human Rights by LGBT Persons: [www.ec.europa.eu/europeaid/sites/devco/files/toolkit\\_.pdf](http://www.ec.europa.eu/europeaid/sites/devco/files/toolkit_.pdf)  
Stonewall International, The Sustainable Development Goals & LGBT Inclusion: [www.stonewall.org.uk/sites/default/files/sdg-guide\\_2.pdf](http://www.stonewall.org.uk/sites/default/files/sdg-guide_2.pdf)  
USAID, Toolkit for integrating LGBT rights activities into programming in the E&E Region (2014): [www.usaid.gov/sites/default/files/documents/1863/LGBT%20Toolkit%20092414.pdf](http://www.usaid.gov/sites/default/files/documents/1863/LGBT%20Toolkit%20092414.pdf)  
LGBT+ Inclusion in International Development Programming: A checklist for UK Aid Connect proposals: [www.bond.org.uk/sites/default/files/resource-documents/lgbt\\_inclusion\\_checklist\\_-\\_uk\\_aid\\_connect.pdf](http://www.bond.org.uk/sites/default/files/resource-documents/lgbt_inclusion_checklist_-_uk_aid_connect.pdf)

AGE

Restless Development, ActionAid & Plan: Global Agreements, Grassroots Advocacy, Youth Participation in a post-2015 world: [www.restlessdevelopment.org/file/global-agreements-grassroots-advocacy-toolkit-pdf](http://www.restlessdevelopment.org/file/global-agreements-grassroots-advocacy-toolkit-pdf)  
UN World Youth Report, Youth Civic Engagement (2016): [www.unworldyouthreport.org/images/docs/un\\_world\\_youth\\_report\\_youth\\_civic\\_engagement.pdf](http://www.unworldyouthreport.org/images/docs/un_world_youth_report_youth_civic_engagement.pdf)  
Population Council (2013) Girls on the Move, Adolescent Girls & Migration in the Developing World: [www.popcouncil.org/uploads/pdfs/2013PGY\\_GirlsOnTheMove.pdf](http://www.popcouncil.org/uploads/pdfs/2013PGY_GirlsOnTheMove.pdf)



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