

IREX Gender Equality and Social Inclusion Resource Guide



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Purpose of This Document

The IREX Gender Equality and Social Inclusion (GESI) Resource Guide provides overall guidance and links to practical tools for promoting inclusion and diversity across IREX programming and internal operations. It is designed to be both holistic and modular. For example, staff can begin designing new projects from scratch using this document as a guide, or, for ongoing initiatives, staff can check to see whether or not they are effectively mainstreaming GESI into any stage of program activity.

The *GESI Resource Guide* also offers IREX-generated and external resources to help staff integrate GESI considerations into programming and IREX operations. We welcome your feedback on how to improve this document and accompanying tools. Please email genderandinclusion@irex.org with your thoughts.

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1. IREX and Inclusion

IREX's longstanding commitment to inclusion is embodied in our mission to build a more just, prosperous, and inclusive world. Our work in this area is more crucial than ever. As IREX President and CEO Kristin Lord has stated, "At a time when poverty persists for too many people, youth populations are bulging, and both terrorism and repression are on the rise, the need for greater inclusion and opportunity is urgent."

[1.1 Inclusive Development is Effective Development:](#) Not only is inclusion an issue of fairness, but we believe that inclusive societies are more just and prosperous. Research bears out the advantages of inclusion and diversity. Whether in programs, administrative operations, or society at large "groups of diverse problem solvers can outperform groups of high-ability problem solvers" (Hong and Page) and culturally diverse networks increase the likelihood of generating new ideas (Chua, Roy Y.J.).

Yet, despite the benefits, inclusion does not happen automatically, or as one business leader stated, "If you do not intentionally include, you unintentionally exclude."¹ This Resource Guide is meant to provide staff with IREX's best thinking on good practices in the development sector that actively promote inclusion.

[1.2 Diversity vs. Inclusion:](#) What is the distinction between diversity and inclusion? As one source notes, "Diversity is where you count people, inclusion is where people count."² In essence, diversity looks at the participation of underrepresented people within activities and institutions. Inclusion takes this a step further by examining the *levels of power and involvement* representatives of groups have, such as who leads within an organization or who influences the direction of a program.

[1.3 Gender and Social Inclusion \(GESI\) Principles:](#) GESI "is a concept that addresses unequal power relations between different social groups. The GESI approach to development focuses on the need for action to re-balance these power relations and ensure equal rights, opportunities and respect for all individuals regardless of their social identity."³

The IREX Gender and Social Inclusion Approach is guided by the core principles below. These are designed to be mutually reinforcing, building on one another to ensure that IREX's project design, budgeting, implementation, and evaluation are as inclusive and sustainable as possible. When employing these principles, ask the following: What does inclusive programming look like? How can our end goal be reflected in our principles? How will we know if we are being inclusive?

¹ Neil Lenane, Business Leader of Talent Management, Progressive Insurance

² Association for Size Diversity and Health

³ Adapted from: *A Common Framework for Gender Equality & Social Inclusion* (International Development Partners Group, Nepal. 2017.)

IREX GESI Principles	
Awareness	For projects to be successful and sustainable, a comprehensive understanding of the operating environment is paramount. All decisions are informed by the continual assessment of the social, cultural, political, economic, and legal context in which we are working throughout the life of the program and adapting our approaches to maximize the meaningful and safe inclusion of marginalized people.
Do No Harm	All decisions are informed by a strong foundational awareness to mitigate any potential negative or unintended consequences to beneficiaries, partners, or staff.
Participatory Inclusion	We employ a robust participatory inclusion approach to ensure all groups are included and engaged as valued decision-makers, leaders, and drivers of change.
Human Dignity	Our programs apply a rights-based approach with a focus on building agency and safeguarding the human dignity of all people.
Accountability	We hold ourselves accountable to these principles through a variety of mechanisms including transparency, indicators, allocated resources, and building staff capacity.

1.4 Key Identity Groups & Intersectionality: This document and related IREX GESI trainings primarily focus on the following key identity groups which represent some of the most underserved populations in international development and society at large:

- Persons with Disabilities
- Lesbian, Gay, Bisexual, Transgender and Queer (LGBTQ)⁴ People
- Women and Girls
- Youth
- Religious and Ethnic Minorities

It is important to note, however, that these identities don't exist in silos. People belong to multiple social categories, which can compound or mitigate barriers to their participation. Taking an intersectional approach means keeping these complex realities in mind at all times and actively seeking out—and acting upon—both recognized good practices and the direct input of people from underrepresented groups.

1.5 Two-Track Approach to Inclusion in Programming: IREX encourages all staff to work towards inclusion, from implementing programs that support more underserved people to promoting more diverse hires.

1. ***GESI-Specific Programming:*** These programs recognize and take action to correct a lack of inclusion in a specific sector or in society as a whole. For example, IREX's [Tech Age Girls](#) works to reduce the myriad ways in which the gender digital divide constrains educational and economic

⁴ Several variations of LGBT, LGBTQ, LGBTQIA, etc. exist. For the purposes of this document, we employ LGBTQ as “queer” helps create space for identities that don't readily fall into “lesbian,” “gay,” “bisexual,” or “transgender,” such as people who are gender-fluid or gender nonconforming. There is a trend among certain NGOs to not use the I for “intersex” when organizations lack programming, expertise, or representation of intersex persons.

opportunities for young women by providing specialized leadership and information technology training, mentors, and hands-on opportunities as positive agents of change in their communities.

2. *GESI Mainstreaming*: The process of assessing the implications for underrepresented groups of any planned activity and taking action to enhance their inclusion. For example, IREX’s [Global Libraries](#) programs in Moldova, Romania, and Ukraine took note of unmet needs among library patrons by gender, age, ability and ethnicity, and designed new library services for vulnerable and marginalized groups. To do so, staff often sought local partners in areas outside of IREX’s general expertise, such as reproductive health & rights activities for adolescent girls and boys, and *pro bono* legal services for recent immigrants.

2. GESI and the Program Lifecycle

Ideally, inclusion is considered even before program activities are designed in earnest. However, programs that are already underway can still benefit from performing an inclusion analysis and reviewing inclusion practices thus far while looking for areas to improve moving forward.

2.1 Inclusion Analysis: An analysis of the operating environment and key issues affecting disadvantaged groups should be undertaken for all IREX programs and interventions regardless of their current state of development (e.g., design, launch, implementation, or evaluation). Even a few

hours of thoughtful desk research and intentional conversations with local staff can yield useful insights that can inform changes to program design and delivery. However, investing more time and direct engagement with underrepresented individuals and the local organizations that serve them, will yield richer results that can contribute to truly robust inclusion. An Inclusion Analysis typically has the following key elements:

- An overall analysis of various key identities in the target operating environment;
- An examination of social norms and power dynamics, from individual to country level;
- A review of how intersectionality affects local patterns of social exclusion/inclusion;
- Identification of major issues that need attention and which are already being addressed; and
- A detailed list of key stakeholders (individuals, groups, institutions, etc.) with the desire and ability to transform areas of social exclusion.

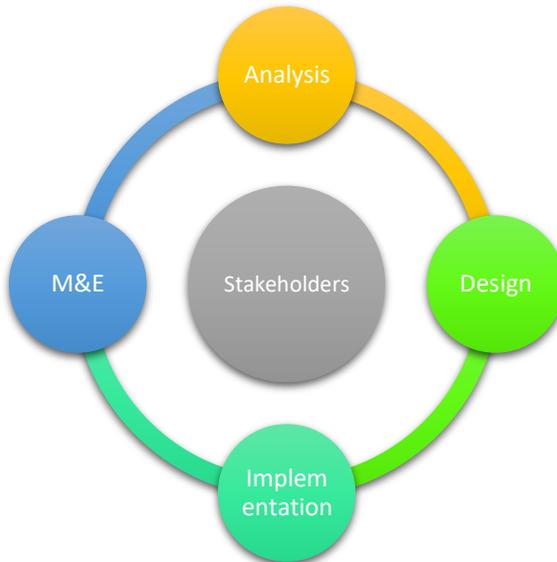


Figure 1: Typical project lifecycle

Inclusion Analysis at a Glance

Approaches: Desk research of credible secondary sources, focus group discussions, key informant interviews, and meetings with relevant local organizations, government offices, and donors.

Tool(s): Stakeholder analysis and mapping tool

2.2 Program Design: Many opportunities exist to apply the results of your inclusion analysis at foundational points in a program, including when writing an initial concept-paper, developing a full proposal, or creating an annual workplan. Look at each activity from outreach and selection to the final

evaluation and identify ways to mitigate potential barriers to underrepresented groups' meaningful inclusion and, likewise, to highlight "boosters" that can enhance groups' engagement.

While not every inclusion approach has associated costs, it is vital to identify and allocate budgetary resources to support your inclusion efforts. An ***inclusion-sensitive budget*** will address the needs and interests of individuals from different identity groups. For example, budgeting to hire an Inclusion Specialist who can both direct and monitor inclusion approaches can be a significant investment. It also sends a powerful signal to funders about IREX's commitment to the participation of underrepresented groups. By contrast, forming an Advisory Council with robust representation from marginalized groups is relatively low-cost. Multiple design approaches can and should be combined to maximize (and measure) inclusion while staying within budget.

Program Design at a Glance

Approaches: Partnering with INGOs and/or local organizations serving underrepresented groups; Dedicated subgrants for underrepresented groups or projects that support them; Budgeting for an Inclusion Specialist on staff or adequate consulting time; Forming an Advisory Council with a diverse array of people with disabilities, women, LGBT people, religious and ethnic minorities.

Tool(s): Inclusion in Proposals Checklist; Inclusive Budget Checklist

2.3 Program Implementation: Proposal deadlines can limit the amount of time available for an inclusion analysis at the design stage. To complement and expand on any research done before the award, an ***Inclusion Analysis at Project Start-up*** can add additional perspectives and deepen the direct involvement of underrepresented groups, not only as interview subjects but also as partners in data and analysis. For USAID-funded projects, the mandatory gender analysis can be enriched by expanding the focus on gender & intersectionality through a GESI analysis.

IREX ***Staff Recruitment and Training*** should not only follow all standard IREX policies and procedures for fair hiring but also include thoughtful outreach to diverse organizations, listservs, and media outlets when promoting open positions. In addition, projects can provide staff training on inclusion principles and good practices shortly after program launch and on more specialized topics throughout the project. These can be designed and led by the team's Inclusion Specialist (if the position exists), a consultant, or a local NGO.

The terminology used in ***Reporting and Communications*** can send powerful signals about who is invited to co-design and lead activities and also how an organization truly views them. As with Positive Youth Development, references to participants should be assets-based. For example, people are survivors of conflict or gender-based violence, not victims. Consult with local organizations about the proper terminologies to use about identity groups. For instance, while "LGBT" has gained a lot of traction globally, there are indigenous sexual and gender identities that might be more suitable. Your inclusion analysis should also look at what languages are spoken by minority groups and how inclusive language can be translated or adapted to those languages, as well as what specific forms of media they follow.

As mentioned previously, ***Annual Work Planning*** represents an excellent time to conduct an inclusion analysis or update previous research findings, reflect on previous challenges and successes, and plan for concrete changes in the coming program year. Specific activities that can support inclusion in a project include the following:

Program Type	Approaches to Inclusive Programming
All	Invite diverse speakers to events and interview diverse experts for communications and Monitoring, Evaluation, and Learning
All	Promote activities and share program results via diverse media and through local groups serving underrepresented people
All	Form an Advisory Council with underrepresented people to guide the program
All	Partner with INGOs and/or local NGOs serving underrepresented groups
Training	Involve underrepresented groups in developing learning objectives, training content, and metrics of success
Training	Hire diverse trainers and inclusion specialists to offer technical assistance
Training	Infuse examples of diverse people within training materials whenever possible
Training	Conduct sensitivity training of participants using adult learning principles
Subgrant	Encourage applicants to partner with diverse organizations/form diverse coalitions
Subgrant	Include an application section requiring prospective subgrantees to explain how their proposed activity is inclusive and will support underrepresented groups, with “inclusivity” among evaluation criteria
Subgrant	Create a subgrant category specifically for activities that support underrepresented individuals and communities
Exchanges	Award points for applicant diversity and/or experience supporting underrepresented groups
Exchanges	Increase the diversity of people serving on selection committees
Exchanges	Recruit and select host organizations that are diverse, have robust nondiscrimination policies, and can demonstrate their commitment to inclusion
Exchanges	Have underrepresented groups review orientation materials and include their perspectives
Advocacy	Encourage/award points for coalitions that emphasize or can demonstrate diversity
Advocacy	Include a subset of awards and accompanying training specifically to promote the voices and perspectives of underrepresented groups

Regardless of the extent to which inclusive activities have been integrated into workplans, IREX projects that effectively employ an **Adaptive Management** approach are best equipped to respond to new opportunities and threats as they arise. Like all development processes, inclusion is dynamic, and the situation for underrepresented people is constantly in flux. Adaptive management promotes intentional learning and flexible project and activity design to optimize responsiveness and, ultimately, equitable impact. Read more about USAID’s views on the subject here: <https://usaidlearninglab.org/library/discussion-note-adaptive-management>.

Program Implementation at a Glance

Approaches: See table above.

Tools (Staff Training): Identity wheel; Privilege walk; Individual Inclusion Sensitivity Scale; Developing a Project-Level Team Culture and Capacity for Inclusion

Tools (Implementation): Inclusive Work-Planning; What Change is Possible?; Risk Management Through an Inclusive Lens; Addressing Resistance; Promote Opportunities for Change; Subgrantee Pre-Workshop Survey; Subgrantee Inclusion Training Overview

2.4 Monitoring, Evaluation, and Learning (MEL): MEL systems develop indicators, gather data, and evaluate results to continually strengthen inclusion. All MEL activities are an opportunity to learn and apply findings to existing activities as well as inform the design of future projects. Inclusive Approaches to MEL center the voices, experiences, and participation of underrepresented individuals, analyzing and addressing potential barriers to underrepresented groups' involvement and assessing the benefits they derive from inclusion.

Will your project collect and analyze data that identify who is and is not participating in or benefiting from your activities based on their gender, race, ethnicity, age, disability, sexual orientation, etc.? Pay special attention to considerations around **ethical data collection principles** when at-risk populations are study subjects, as asking individuals to openly identify as a member of certain groups may put them at risk. Consult with local staff, local partners, and local organizations first to ascertain the right approach to capturing relevant demographic data while ensuring underrepresented individuals' safety. Also, see Appendix III for Links to Relevant External Resources, such as the Williams Institute's guides to surveys including LGBT individuals.

As part of your MEL plan, develop and track specific indicators to measure the participation of underrepresented groups and progress towards meaningful social inclusion. Typically, **inclusion indicators** and indicators that aim to monitor level of inclusion in results will examine the following elements: 1) Access; 2) Quality; 3) Equity; and 4) Ownership/Empowerment.

For insights into MEL in more restrictive societies, read "[M&E in closing spaces – how to assess and mitigate risks](#)" by IREX's Charles Guedenet and co-author Shanthi Kalathil at the DME for Peace blog.

One technique that has shown positive results in this area is the **Most Significant Change methodology**. "The Most Significant Change (MSC) approach involves generating and analysing personal accounts of change and deciding which of these accounts is the most significant—and why."⁵ This technique of structured story collecting lets underrepresented participants define the importance of their involvement in a program or activity for themselves. See the [MSC tool](#) for more.

Assessments and evaluations are prime opportunities to directly involve underrepresented groups in setting the research agenda and contributing diverse points of view to the interpretation of data. Examine: Who's designing your research questions? Who are your sources? Who's defining the metrics of success? How will you validate preliminary findings with disadvantaged groups?

Monitoring, Evaluation, and Learning at a Glance

Approaches: Forming an Advisory Council with a diverse array of people with disabilities, women, LGBT people, religious and ethnic minorities to monitor and guide the project; Involving underrepresented stakeholders in developing, reviewing, collecting, and analyzing data; Most Significant Change (MSC)

Tool(s): Envisioning Sustained Impact/Making an Impact & Sustainability Plan; Most Significant Change; Inclusive Results Pyramid

⁵ Better Evaluation. "Most Significant Change."
http://www.betterevaluation.org/plan/approach/most_significant_change

3. The GESI Matrix

Every initiative can benefit from taking an inclusion approach. However, IREX recognizes that each program has differing levels of staff time and budgetary resources, which can, for example, impact the thoroughness of an Inclusion Analysis or funds available for Inclusion Specialist consultations. Likewise, operating in a socially restrictive country may make certain forms of inclusion work untenable or even dangerous for participants, staff, or both. The GESI Matrix below can help guide you in this process.

	Resources Increase →	
Social Restrictions Increase ↑	Fewer Resources Available / Socially Restrictive Environment	More Resources Available / Socially Restrictive Environment
	Fewer Resources Available / Less Socially Restrictive Environment	More Resources Available / Less Socially Restrictive Environment

Once you’ve identified which quadrant is most suited to your project or activity, the GESI Matrix Tool offers key activities and accompanying tools to help you maximize inclusion. Projects that don’t fall neatly into one of the quadrants should employ a hybrid approach with a combination of suggested interventions.

GESI Minimum Standards: Regardless of the level of resources or the type of operating environment, IREX recommends that all projects engage in core inclusion work, including conducting an **Inclusion Analysis** and completing the **Inclusive Budget Checklist**. These are included in the following four baseline steps:

Step 1: Explore the power dynamics of personal identities as they relate to social inclusion and the community in which the IREX team operates.

Step 2: Conduct assessment of the landscape to identify boosters and barriers to inclusion; consider potential differential impacts of your project on included and excluded populations.

Step 3: Adapt work plan and budget to be more inclusive while working within environmental constraints.

Step 4: Implement project, guided by inclusive action plan.

See the GESI Matrix Tool for more details.

4. IREX Operations

IREX internal operations, including policies and processes, capture the core principles of gender equality and social inclusion. We strive to ensure that all people working at IREX have equal opportunity to reach their full professional potential. IREX also recognizes the importance that all voices be heard at all levels, and we strive to reflect this inclusive philosophy within our own organizational structures.

Human Resources: IREX employee policies at the Headquarters in Washington, DC and in the countries where IREX has field offices all endeavor to reflect good practices in inclusion. In DC, IREX employees should refer to the resources available on the [Human Resources Portal](#), in particular the IREX Employee Handbook, for a comprehensive description of HR policies. In the field, IREX employees should refer to the Field Administrative and Human Resources Management Manual, which varies by country and are subject to local labor laws.

Staff Competencies: In addition to the merit-based hiring of diverse staff as well as hiring staff with experience in inclusion work, managers can further foster inclusion by requiring inclusion-based competencies in employees' annual reviews. As appropriate to their position, staff can articulate how they've worked toward building inclusion, such as completing inclusion-sensitive work plans, forging partnerships with organizations supporting underrepresented groups, and completing professional development trainings.

Professional Development: IREX encourages staff to commit to continued professional development regarding diversity and inclusion. Individual staff can use their personal development funds for relevant skill-building. Individual programs, offices, and units can schedule team-specific inclusion trainings. In addition, IREX offers the following GESI-based staff trainings:

- **[“Towards Meaningful Inclusion in International Development”](#)** (~5 hours long)
Learning Objectives: 1) Be able to articulate the importance of diversity and inclusion to development outcomes; and 2) Have increased knowledge of identity-based barriers for full inclusion in IREX's technical sector work.
- **[“Inclusion in Action Training of Trainers \(ToT\)”](#)** (8 hours)
Learning Objectives: 1) Understand and apply IREX's Gender Equality and Social Inclusion (GESI) Principles in their work; 2) Outline a plan to conduct future inclusion analyses; and 3) Help staff directly use and work with partners to use IREX GESI tools.
- **[“GESI and Do No Harm”](#)** (4 hours)
Learning Objectives: 1) Have increased knowledge of key Do No Harm concepts and approaches; and 2) Be able to employ Do No Harm principles in your work.

What Builds Diverse Teams?

To explore evidence-based approaches that promote inclusion within organizations and teams, read [“Why Diversity Programs Fail”](#) by *Harvard Business Review* (July–August 2016).

5. Appendix I: Links to IREX Tools Developed by the GESI Initiative

Function(s)	Tool
Guidance	Glossary of GESI terms
Guidance	Good Practices in Working with Diverse Populations
Guidance	Gender Equality and Inclusion Continuum
Analysis	GESI Matrix
Analysis	Stakeholder Analysis and Mapping
Program design	Inclusion in Proposals Checklist
Program design	Inclusive Budget Checklist
Staff training	Identity Wheel
Staff training	Privilege Walk (group activity that must be in-person)
Staff training	Individual Inclusion Sensitivity Scale
Staff training	Developing a Project-Level Team Culture and Capacity for Inclusion
Implementation	Inclusive Work-Planning
Implementation	What Change is Possible?
Implementation	Risk Management Through an Inclusive Lens; Risk Assessment Matrix
Implementation	Promoting Inclusion and Addressing Resistance
Implementation	Promote Opportunities for Change
Implementation	Subgrantee Pre-Workshop Survey
M&E	Envisioning Sustained Impact/Making an Impact & Sustainability Plan
M&E	Most Significant Change (MSC)

6. Appendix II: Links to IREX Resources Developed by Projects

Population	Resource	Notes
LGBTQI	Promoting LGBTQI Inclusivity Mandela Washington Fellowship, YALI	Includes best practices for promoting LGBTQI inclusivity and interacting with communities and people of foreign cultures
People with Disabilities	Disability Sensitization Guidance Mandela Washington Fellowship, YALI	Addresses visible and invisible disabilities and provides questions/suggestions for inclusion assessment
Gender	Organizational Capacity Self-Assessment Tool for Civil Society Organizations in Jordan Families in the Digital Age (FADA)	See measures and assessment questions for gender inclusivity

This is a living document so that this list can be updated periodically. Please submit additional resources to: genderandinclusion@irex.org

7. Appendix III: Links to External Resources

Population	Resource	Notes
All	<i>The Transforming Agency, Access, and Power (TAAP) Through Inclusive Design Toolkit</i> (download here)	From World Learning and IREX. A comprehensive document to infuse inclusion at every program stage.
Persons with Disabilities	Inclusion Made Easy: A Quick Program Guide to Disability in Development (Part A: disability-inclusive development principles)	See especially: Disability-inclusive consultations and events (pg. 24-27)
Persons with Disabilities	Making Meetings and Events Accessible to Disabled People	From the Disability Resource Centre
Persons with Disabilities	Disability Communications Tips	From USAID
Persons with Disabilities	Rapid Assessment of Disability (RAD)	A questionnaire to gather demographic information
LGBT	Toolkit for Integrating LGBT Activities into Programming in the E&E Region	From USAID. See especially: 10 Steps for Successful LGBT Development Programming (pg. 12-13)
LGBT	Violence Against Women and Girls (VAWG) Resource Guide Sexual and Gender Minority Women	See: Rapid Situational Analysis (pg. 7-8)
LGBT	Best Practices for Asking Questions to Identify Transgender and Other Gender Minority Respondents on Population-Based Surveys	From the Williams Institute
LGBT	Best Practices for Asking Questions about Sexual Orientation on Surveys	From the Williams Institute
Women & Girls	CARE Gender Marker	Helps teams measure the integration of gender into programming
Women & Girls	Seven Steps to a Gender Analysis	From Jhpiego
Women & Girls	Guide to Gender Integration and Analysis	From USAID
Women & Girls	Integrating Gender throughout a Project's Life Cycle 2.0	See: Approach to Gender Analyses (pg. 20-22), Reaching Women Without Alienating Men & Build Men's Support (pg. 34), Involving Men in Gender-Related Activities (pg. 37)
Women & Girls	Gender Responsive Budgeting in Practice: A Training Manual	From UNFPA and UNIFEM
Youth	Youth Participation Guide: Assessment, Planning, and Implementation	See: Implementing Youth Participation (pg. 3-4), From Youth Participation to Youth-Adult Partnerships (Background handout 2), Tips for Adults Working with Youth (Background handout 8), Group Self-Assessment Guide (IAPT Participant Handout 2)

Population	Resource	Notes
Youth	<i><u>Guiding Principles for International Youth Development</u></i>	See: Youth Engagement (pg. 16-19)
Youth	<i><u>Guide to Cross-Sectoral Youth Assessments</u></i>	See: Developing an Assessment Framework (pg. 3-7), Democracy and Governance (DG) Indicators (pg. 15-16), and Engaging Youth and Learning about their Perceptions and Experience (pg. 33-37)
Religious & Ethnic Minorities	<i><u>Working with National or Ethnic, Religious and Linguistic Minorities and Indigenous Peoples in Forced Displacement</u></i>	From UNHCR
Religious & Ethnic Minorities	<i><u>Marginalised Minorities in Development Programming: A Resource Guide and Toolkit</u></i>	From UNDP. See: Box 22. Practical measures to facilitate the participation of minorities in local consultation (pg. 104) and Integrating Minorities in Programme Cycle (pg. 146-147)