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Using gender-analysis frameworks: theoretical and practical reflections

Hannah Warren

While gender research methodologies, such as gender-analysis frameworks, can contribute to ensuring that development practice promotes gender equality, their use is only one element in the process, and cannot alone ensure that gender considerations are integrated into development practice. Their use needs to be combined with, and based on, clear political and theoretical underpinnings and specific goals and objectives. This article reflects on the challenges experienced when training in and using these frameworks, examining the importance of the theories underlying various frameworks, the necessity for clear objectives for such work, and ultimately the need to be mindful of the challenges experienced if attempts are made to reduce 'the political project of gender and development ... to a "technical" fix' (Cornwall et al. 2004, 4).

Introduction

Since the 1970s, the issue of women, and later gender, in development has assumed an ever-increasing prominence and popularity within the development community. However, despite (or perhaps because of) numerous theoretical and practical advances and variations, there is much confusion and debate concerning the means by which 'gender' considerations can be integrated into development practice. These debates concern not only the theoretical approach undertaken and intended goals and objectives, but also the practical strategies and methods which can be used to implement these and incorporate 'gender' into development projects and programmes. In response to the demand for easy-to-use practical tools by which 'gender' can be systematically incorporated into development practice, various gender-analysis frameworks have been developed.

This article provides reflections on the training in and use of gender-analysis frameworks, drawing on my experiences while working in Ghana for two local non-governmental organisations (NGOs) from 1999 to 2001, and more recently for a UK-based civil society support organisation, the International NGO Training and Research Centre (INTRAC) from 2005 to 2007. It considers the challenges and limitations as well

as the value of using such frameworks in development practice, and highlights some of the issues faced in training others to do so.

In order to analyse my experiences and understand some of the issues and challenges which occur when using, and training others to use, gender-analysis frameworks, it is necessary first to provide a brief background regarding the emergence and origins of these frameworks, an overview of the different frameworks which exist, and an analysis of how these fit more generally into the various theories and approaches to gender in development. This will provide background information which is crucial to acknowledge and understand when designing and facilitating gender-analysis training. The article will go on to discuss various challenges faced in incorporating gender-analysis frameworks into gender training courses when training others to use these frameworks in their work, and issues related to their application.

Gender-analysis frameworks

Gender-analysis frameworks have been used in development practice, to varying degrees, since the mid-1980s. They aim to provide methods by which to gather and use sex-disaggregated and gender-related data and information to inform development interventions at various stages, from project/programme conception and design through to evaluation. They aim to promote gender-aware development practice by ensuring that gender is taken into consideration at every stage of programme implementation.

The demand for and emergence of gender-analysis frameworks

Gender-analysis frameworks emerged initially in response to the realisation of the significance to development of the differing roles of men and women and the social construct of gender². Until the 1970s, development was generally assumed to be gender-neutral and of equal benefit to men and women (Karl 1995; Rao 1991). However a number of studies³ illustrated not only the varying impacts of development on men and women (often citing negative effects on women), but also the failures of development interventions (what Kabeer terms 'project misbehaviour' (1994, 268)). These failures were identified as having occurred as a result of ignoring or making erroneous assumptions regarding the differing roles and activities undertaken by men and women in the variety of contexts in which development projects were being implemented. As Karl states, 'The high rate of failure of development policies, programmes and projects is attributable at least in part to the neglect or *lack of knowledge* of women's productive and reproductive roles' (Karl 1995, 94, emphasis mine). Thus, the demand emerged for methods which could assist development planners to gather data from which to make informed decisions for the benefit of both men and women, prevent possible negative effects, and make development more

effective and efficient (Longwe 1991; Rao 1991; Gianotten *et al.* 1994; Kabeer 1994; Karl 1995).

There was also a growing political desire, led principally by feminists in the development sector, and later adopted throughout the majority of development agencies (at least in rhetoric), to address and transform unequal gender relations and 'empower' women. Thus *gender equality* became an objective of development. However, this *desire* for gender equality alone was not sufficient and as Smyth points out, 'For a long time, [development] agencies have been decrying the lack of expertise and methodologies that prevents them from achieving their objectives' (Smyth 1999a, 14).

The need for appropriate methodologies was, and still is, felt by many to be the missing factor in translating the desire among those committed to 'incorporating women/gender into development' into practice. For instance, as Moser (1993, 5) has argued 'many of those committed to integrating gender into their work at policy, programme or project levels still lack the necessary planning principles and methodological tools. This issue is critical; planners require simplified tools which allow them to feed the particular complexities of specific contexts into the planning process'.

Theoretical perspectives and goals of incorporating gender into development

One of the key issues often plaguing development organisations in relation to *gender* is the multiplicity of meanings and goals that this concept encapsulates. Thus, to a large extent, what development organisations mean by 'a focus on gender' or 'a gendered approach' and what it means to their work is often undefined and even contested. This combines with a 'lack of clarity and precision' (Smyth 1999b, 20) in the use of gender terminology, which is compounded by an often simultaneous tacit assumption of commonality. As a result, as Porter and Smyth point out, 'Development institutions differ very widely in the extent to which they are committed to gender equity, what that commitment entails and the means they propose to adopt in order to achieve related goals' (Porter and Smyth 1999, 326). The roots of these differences relate, in part, to the underlying ideologies and values of different institutions, for example the resource and economic focus of the World Bank, compared to the rights and equality agendas of NGOs such as ActionAid and Oxfam. In addition, such variances exist not only between but also within these institutions.

My intention is not to go into detail regarding the various theoretical perspectives and approaches to women/gender in development⁴. However, it is important to highlight the very differing (and arguably incompatible⁵) rationales and goals for incorporating 'gender' into development, as this not only provides the foundations on which any work is undertaken, but has a bearing on the type of gender analysis framework used. Rationales may vary, for example, from making development more *efficient*, to targeting women in their 'traditional' roles⁶ or *empowering* women and

striving for gender equality. The different frameworks themselves have not only emerged in response to these divergent rationales, but consequently address and incorporate the issue of women/gender in development in different ways.

Different frameworks and their theoretical underpinnings

A number of accepted and well known frameworks have been developed over the years including: the Harvard Analytical Framework (HAF) (or gender roles framework); the Moser Framework (also known as the triple roles framework and Moser–Levy framework); the Social Relations Approach (or framework) (SRA); the Gender Analysis Matrix (GAM); the Women’s Empowerment (Longwe) Framework; and the Capacities and Vulnerabilities Analysis Framework (Kabeer 1994; Mahama 2001; March *et al.* 1999; Tsikata 2001). In addition there are a number of less well known methods, including participatory rural appraisal (PRA) (Humble 1998) and rapid rural appraisal techniques (RRA) (Munro 1991), and others developed for use in specific sectors and/or in the South (Smyth 1999a). No doubt others are being continuously developed (Mahama 2001).

However, as indicated above, these are not neutral frameworks which merely provide different methods for achieving the same goal. They do not simply represent different ways of collecting and analysing data in order to make informed decisions regarding ‘incorporating gender’ into development initiatives, since this can in fact reflect a number of different objectives. Gender analysis frameworks have evolved in tandem with the evolution of ‘gender’ in development and are thus ‘based on very different understandings of the nature of power and inequality’ (Kabeer 1994, 270). As a consequence they differ (in some cases significantly) regarding their assumptions of what needs to be analysed and addressed. As Kabeer argues ‘There is . . . an intimate relationship between ways of thinking and ways of doing’ (1994, 303).

It is important to note that significant differences exist between the various gender-analysis frameworks, although I will not attempt to provide a detailed and comprehensive account and comparison here⁷. For example some, such as the HAF, focus principally on the gender division of labour and the activities and roles of men and women, whereas others, for instance the SRA, give a more central place to the analysis of relationships between men and women (Kabeer 1994). This links back to the rationales on which the frameworks are premised and, for example, whether they have *efficiency* or *empowerment* objectives (see Smyth 1999a, 25). As Boateng claims, ‘The theoretical background of a framework determines which aspects of a situation it seeks to identify and the nature of the changes that are possible’ (Boateng 2001, 216).

This understanding of the origins and theory behind gender-analysis frameworks, I argue, is crucial when using such methods and facilitating gender training which aims specifically to impart skills and tools by which development personnel can ‘incorporate gender’ into their work.

Training in gender-analysis frameworks

Gender training

'Gender training is a range of activities which seek to inform, raise consciousness and equip different categories of persons with the skills to enable them to address gender inequalities in their work, their lives, and in society at large' (Acquaye-Baddoo and Tsikata 2001, 61). It has been used in the development sector for the past 20 years or so, and a variety of courses have emerged, with differing objectives. These include gender awareness and sensitivity training; gender analysis and planning training; training for policy-makers; and skills training for women (Karl 1995; Acquaye-Baddoo and Tsikata 2001). In addition to these, training has also been categorised according to the underlying approach taken to gender issues and may focus on and aim towards different goals including, for example 'gender subordination, equity or efficiency [of development]' (Acquaye-Baddoo and Tsikata 2001, 61; see also Mukhopadhyay and Appel 1998).

Gender-analysis training

Gender training, similar to the desire for gender analysis frameworks, is often undertaken in response to the demand among development organisations to equip personnel with necessary skills and tools. Thus it is often seen as a technical solution to the difficulties of incorporating gender into development (Porter and Smyth 1999; Seed 1999), particularly in the case of gender-analysis (and planning) training. For example, in my experience of facilitating gender training courses, particularly those with a focus on gender analysis, such as the INTRAC training course 'Gender Planning in Development', there is often a high demand from participants for a package of *tools* and frameworks which enable them to 'do gender'⁸. This has led to the ongoing observation, criticism, and dilemma that gender training risks being divorced from theory, becoming no more than a technical fix (Seed 1999; Tsikata 2001).

However, as outlined above, the frameworks and tools which are conveyed in gender training are themselves premised by, and interwoven with, theory and political ideology. Therefore it is crucial in any training to ensure that these practical tools are combined with a sound understanding of the values and ideology which underpin them, as well as providing participants with a necessary critical consciousness regarding the differing approaches which can be adopted in relation to gender in development. To ensure this, trainers need to be fully conversant with the theory underpinning gender-analysis frameworks.

When I facilitated my first gender training courses in Ghana in 1999, although I was familiar with theories surrounding 'gender and development', my understanding of the nuances of the various frameworks and their differing theoretical underpinnings was not fully developed. As a result, while my own philosophy behind incorporating 'gender' into development was based on a feminist desire to transform gender

relations and combat gender inequalities, this was no doubt counterbalanced and confused by my use of the Harvard Analytical Framework (HAF) in order to provide others with the tools to facilitate this. I used the HAF in this instance as it provided a simple way of enabling participants to gather data regarding men's and women's activities, and access to and control over resources. What I did not fully appreciate was that when used in practice, taking this information into consideration may do little more than ensure that an intervention is more *efficient*, with no overt focus on the intersections and relationships between men and women and the power relations which exist (see Kabeer 1994).

At the time my inexperience and ignorance surrounding these frameworks meant that I, like others⁹, thought it as simple as selecting one of the numerous frameworks by which participants would be able to gather and analyse the necessary data in order to make their work 'gender sensitive'. But the use of frameworks demands an appreciation of their underlying principles, as well as a clear understanding of the aims of the work being undertaken. As Porter and Smyth point out 'if gender training is seen only in terms of the access to technical skills, the concepts and tools will be misunderstood and ineffective' (1999, 332).

I would not say that these training courses were unsuccessful. On the contrary, they appeared to have profound effects on the participants in relation to their beliefs and attitudes, and realisation that gender, and hence many of the roles performed by men and women, are circumscribed by society and societal norms. But this does highlight the limitations and potential hazards of inexperienced trainers who lack a firm grasp of the history and intricacies of gender-analysis frameworks. Although at the time I was aware that something was amiss, without the necessary knowledge and understanding I was unable to identify and remedy it. Despite being pleased to be able to say that my subsequent experience and education in the theories and practices of 'gender and development' have greatly assisted and influenced my successive gender training practice, they have also added an awareness of an extra level of complexity regarding the training of others in gender-analysis frameworks. This has highlighted a number of dilemmas, at times even tempting me away from the enterprise. However, as the saying goes, I firmly believe that 'it is better to light a candle than curse the darkness'.

Training individuals within institutions

In addition to the trainer's knowledge and understanding of the theory underpinning gender-analysis frameworks, other challenges are faced in the training of others in these methods. These mirror some of the more general problems experienced in gender training. Some of these relate back to both the lack of coherence within, and between, development organisations regarding the goals of 'incorporating gender' and the varying theoretical underpinnings of these frameworks.

Although it is generally acknowledged that gender training needs to be part of an organisation-wide strategy (Mukhopadhyay and Appel 1998; Seed 1999; Acquaye-

Baddoo and Tsikata 2001), this is often not the case, and training is frequently undertaken by only a selection of staff, often from the lower ranks in an organisation (Mukhopadhyay and Appel 1998). However, training a few staff in the application of frameworks will never be adequate, or appropriate, particularly if there is a lack of direction or coherence in terms of an overall policy in which this work can be framed and on which informed decisions regarding the choice of framework can be based. As Smyth argues 'Clarity about their gender-specific objectives and strategies is essential to clarify the "why" and "what" an individual organisation is trying to achieve, before they can make informed choice on the "how", in terms of the methodologies they promote' (Smyth 1999a, 14, emphasis mine). In addition the *ad hoc* training of a selection of staff is unlikely to address the lack of necessary understanding, commitment and skills among other staff, doing nothing to aid a widespread organisational adoption of these methods and consequent changes in practice.

However, even if organisational policies and goals of gender work are clear, difficulties are still likely to occur, as training often takes place with individuals from a range of institutions attending the same course. While this has benefits in terms of enabling participants to share experiences, the existence of different approaches and beliefs among the different participants and organisations represented poses a particular challenge for the trainer in terms of identifying the appropriate framework(s) to use.

To tackle the above, a potential solution in training can be to provide participants with the necessary knowledge to make their own choices regarding the most appropriate frameworks to use, depending on the gender-related goals they hope to achieve. This would entail a different kind of pedagogy, involving experiential learning¹⁰ and enabling participants to assess frameworks based on the extent to which they suit their organisation's ideology. However, participants will remain constrained by their organisation's goals and approaches to gender or the lack of clarity on these.

Perhaps the only truly appropriate solution is to provide more organisational-wide long-term capacity building support, which includes focusing on the *why* and the *what* in addition to the *how*, as opposed to one-off trainings for individual staff. But, as Wallace and Wilson illustrate, an organisational approach does not necessarily solve these issues. They highlight the resistance to a reflective and analytical approach in their work with WaterAid, and the demand for tools, packages, and immediate solutions (Wallace and Wilson 2005).

Beyond training: the application of gender-analysis frameworks

Beyond the training setting, issues and challenges also exist regarding the practicalities and potential complexities of using such frameworks in development practice.

In addition to simply understanding the theory, methodologies, and limitations of gender analysis frameworks, it is also crucial to develop the necessary skills needed to

use them effectively and appropriately. These include the ability to listen to, consult with, and learn from the communities about, and for whom, information is being gathered. Munro (1991), for example details various methods which can be used to enable women [and men] to identify their needs, including discussions around photographs and the documentation of life histories, stressing the importance of factors such as the style of discussions, and location, size, and composition of the group. Stress has also been placed on the need to involve men and women in the planning and evaluation of projects and programmes (Longwe 1991; Munro 1991), rather than simply extracting information, analysing and interpreting this, and developing and imposing interventions.

Combined with this, care needs to be taken in relation to the specific data to be collected and analysed. Although many of the frameworks suggest the kinds of data to be sought, whether these concern roles and activities (i.e. in the HAF), or relationships (i.e. in SRA), adequate care and consultation need to be employed in order to avoid privileging certain information, or excluding other data, and ensuring shared understanding between those collecting as well as those supplying information. For example, in my experience of using the GAM, during a project evaluation in Ghana, confusion arose due to a misunderstanding around assessing the impact of the project on different members of the community. The way in which this concept was translated and interpreted meant that initially, impacts on what had, prior to the project, been considered 'leisure time' were ignored. Once realised this was remedied by further explanation and discussions; however, this indicates the care and attention which need to be exercised. Frameworks are by no means universal (Smyth 1999a), despite often being presented as such, and their use in different cultures has been noted to be problematic due to their outside origins, clashes with local perceptions and beliefs, and difficulties relating to translation (Mukhopadhyay and Appel 1998; Wendoh and Wallace 2006).

In addition, the use of any framework or methodology to facilitate the gathering of data is only part the process. As Smyth points out 'it is essential to remember that no framework will do the work for you. It may help you plan the work that can be done . . . [but] the work must still be done' (Smyth 1999a, 22). The challenge remains to use the information gathered appropriately. For example, in my experience, although using the GAM meant that the current (and future potential) impacts of the project on men and women became clearer, how this knowledge could be translated into concrete practice aimed at addressing gender inequalities was less clear. Thus, while the framework provided an adequate methodology for gathering data, it provided us with no easy answers.

Therefore, despite claims (in this case on behalf of the HAF) that frameworks may 'provide a *sufficient* basis for designing and implementing projects that can best benefit women and benefit by women's participation' (Rao 1991, 11, emphasis mine) alone they are *insufficient*, and need to be combined with other skills and knowledge, along

with a clear strategy and a commitment to implementing this. If organisations and implementers are not clear on what they hope to achieve in terms of 'gender' related goals, no amount of frameworks will assist. As Mahama argues: 'Achieving gender sensitivity implies analysing gender concerns and incorporating them throughout the process... Even where planners are able to gather some gender-sensitive data using appropriate... tools, they still fall short of incorporating this information adequately in the design, implementation and monitoring process' (2001, 414). Indeed, a number of other stages also are required for achieving 'gender sensitivity' in the planning process (*ibid.*).

Conclusions

This article argues that training development practitioners in the use of gender-analysis frameworks is a complex process. It is not a question of simply teaching methods by which practitioners can gather and analyse sex-disaggregated data, thereby ensuring that their work 'takes gender into consideration' or 'promotes gender equality'. Ultimately, the challenge in training is to ensure that a balance is reached between raising participants' awareness of the different theoretical approaches which have emerged, and can be adopted, with reference to gender, and providing them with the necessary skills and frameworks in order to assist them to incorporate whichever approach they choose to follow. In addition, an understanding of the limitations of these methods is needed, and due regard to the fact that the use of such frameworks is only part of the process. It is also crucial to remember that these participants are members of organisations whose particular philosophy in relation to gender, and clarity (or lack of it) about the subject, will frame and/or constrain the potential approaches taken and frameworks adopted. Training a few staff will not alone promote the organisational-wide adoption of such frameworks.

While many of the challenges discussed and highlighted are not easily resolved, acknowledging and analysing them at least means that my practice may benefit from being informed and aware. The demand for tools and methodologies, including gender-analysis frameworks, among participants and development organisations keen to increase their capacity to incorporate 'gender' into their work remains, as does my desire for promoting gender equality. Ultimately, what is clear, and what needs to be kept in mind, is that no technical tools or frameworks can take the place of, or be used in the absence of, clear objectives in relation to gender, and a commitment to these. It is hoped that this will help to avoid the situation uncovered by recent research undertaken in the Gambia, Rwanda, Uganda and Zambia, which found that methods used in gender work were 'often mechanical, focusing more on ticking boxes and recording numbers than addressing values, beliefs and culture' (Wendoh and Wallace 2006, 30), resulting in 'a preponderance of checklists of who does what, when

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and where at the expense of undertaking actual practical work with the communities' (*ibid*, 73).

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Notes

- 1 I am grateful to Indrani Sigamani and Sara Methven for their comments on an earlier draft of this paper.
- 2 By the social construct of gender I refer to the idea that gender roles and relations are not fixed, but vary between different contexts both geographically and temporally.
- 3 Initiated by Esther Boserup in 1970 with the book entitled *Women's Role in Economic Development*. See also Kabeer (1994) for examples of other such studies.
- 4 This is done adequately elsewhere. For detailed accounts of the history and differing perspectives of women/gender in development, including women in development (WID), women and development (WAD) and gender and development (GAD), and approaches from 'welfare' to 'empowerment' see for example Moser (1993) or Kabeer (1994).
- 5 As Tsikata points out 'the two goals of social justice [gender equality] and efficiency are neither similar nor necessarily compatible' (Tsikata 2001, 21).
- 6 By 'traditional' roles I refer to roles/tasks which women traditionally undertake within a specific setting. In some locations this may include activities such as handicraft production or responsibility for water provision.
- 7 There is a range of literature which provides detailed descriptions, analysis and comparisons of various gender analysis frameworks and methodologies, some in the form of guides and manuals aimed to assist development personnel in selection and use. See for example Rao *et al.* (1991), Wallace and March (1991), Moser (1993), Kabeer (1994), Humble (1998), March *et al.* (1999), Boateng (2001) and Mahama (2001).
- 8 This experience is by no means unique and has been noted by others including Mukhopadhyay and Appel (1998), Porter and Smyth (1999), Seed (1999) and Tsikata (2001).
- 9 This includes staff in development institutions, participants in gender training courses, as well as other trainers. For example as Boateng contends 'I believe that my case is not unique and that there are quite a few people engaged in gender training in Ghana who lack systematic knowledge of and training in the necessary concepts, tools [frameworks] and their underlying theoretical frameworks' (2001, 230). Research in Ghana indicates that this may well be the case, finding that '...very few people involved in

gender training... had a strong background in gender studies' (Acquaye-Baddoo and Tsikata 2001, 85). And this is no doubt likely to be true elsewhere.

- 10 Experiential learning (or learning by doing) would enable participants to apply a range of different frameworks in the context of real situations in order to assess the value of each, also providing an appreciation of their differences. This could be undertaken either in a training course or as part of a longer-term supported learning process, such as modular training over a period of time, during which participants would come together for follow-up sessions to share experiences.

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