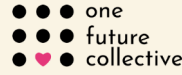




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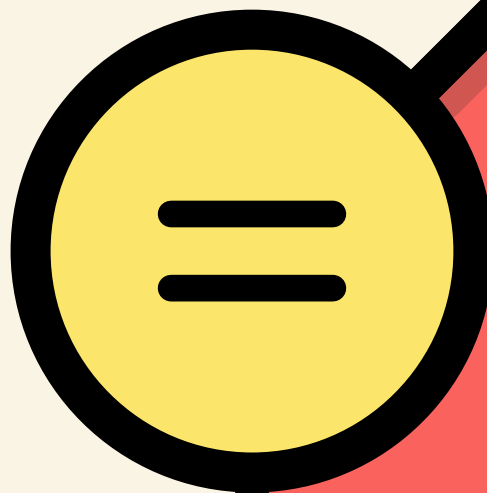


# HOW EDUCATION ORGANIZATIONS CAN PROMOTE GENDER EQUITY

A Gender Diagnostic Toolkit

CO-CREATED BY

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**Disclaimer:**

*Gender diagnostics is an evolving field. This toolkit represents current best practices as of 2025 and the views of the authors. It should be considered a living document intended to facilitate institutional learning and growth. Echidna Giving does not accept responsibility for how these tools are interpreted or applied by third parties.*



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# Acronyms & Abbreviations

<b>CV</b>	Curriculum Vitae
<b>ECD</b>	Early Childhood Development
<b>FAWE</b>	Forum for African Women Educationalists
<b>FGDs</b>	Focus Group Discussions
<b>FLN</b>	Foundational Literacy and Numeracy
<b>GAF</b>	Gender Analytic Framework
<b>HIVOS</b>	Humanist Institute for Development Cooperation
<b>HR</b>	Human Resource
<b>ICRW</b>	International Centre for Research on Women
<b>M&amp;E</b>	Monitoring and Evaluation
<b>OFC</b>	One Future Collective
<b>SMART</b>	Specific, Measurable, Achievable, Relevant, Time-Bound Goals
<b>SRGBV</b>	School Related Gender Based Violence
<b>SOW</b>	Scope of Work
<b>SOW</b>	Statement of Work
<b>TLMs</b>	Teaching Learning Material
<b>TOR</b>	Terms of Reference
<b>UNICEF</b>	United Nations Children's Fund
<b>UN WOMEN</b>	United Nations Entity for Gender Equality & the Empowerment of Women
<b>UN YOUTH</b>	UN entity that promotes meaningful youth participation, positioning youth not merely as beneficiaries but as active agents of change.

# Acknowledgements

This Toolkit is based on insights from the Gender Review Project conducted jointly by Jaslika and One Future Collective (OFC). We are grateful to all those who participated in this study, from India, Kenya, Tanzania, Uganda, the Americas, and the United Kingdom. Your thoughts and experiences contributed significantly to the development of this product.

We express our sincere appreciation to Echidna Giving for their generous support and visionary guidance, which enabled the development of this Toolkit. As a funding partner dedicated to advancing gender equity and transformative change in education, Echidna's confidence in our collective expertise and mission has played a crucial role in the successful completion of this project.

Last but not least, we would like to acknowledge the contributions of Jaslika's Wangui Ngang'a, Jasmine Wangari, Mary Njeri, Neil Aming'a and Ian Kamau (Kenya), Michael Kijavara (Tanzania), Jalia Risasi (Uganda), and OFC's Anvita Walia, Titash Nodi, and Vaishali Singha, in the creation of this Toolkit. Without their support, this work would not have been possible.

# About Jaslika and One Future Collective

The Gender Diagnostic Toolkit is a collaborative product co-created by Jaslika (East Africa) and One Future Collective (India).

## Jaslika Consulting

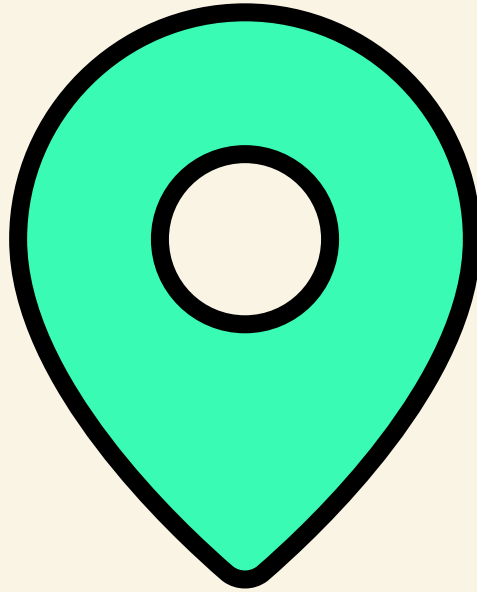
Inspired by traditional African cosmology, Jaslika's work, symbolized by concentric circles with radiating dots, embodies holism, interconnectedness, and the perpetuity of life. Founded in 2016, Jaslika is an intersectional feminist organization dedicated to fostering equity and social justice in education, gender, youth participation, and child rights in East Africa.

Specializing in research and evidence-based advocacy, Jaslika influences educational policy and practice. They employ both creative and conventional methods, including intergenerational policy and community dialogues, and simplifying government policies to promote holistic child development.

## One Future Collective

One Future Collective exists to advance social justice by catalysing people power and just institutions. Founded in 2017, they are a feminist social purpose organisation with a vision of a world built on social justice, led by communities of care. They design high-quality and impactful programs, products, and services to achieve their mission. They do this through their cyclical model of social change: people power and just institutions.

They have been recognised globally for their work by way of awards, partnerships, and acknowledgement of their knowledge tools and advocacy efforts, including commendations from Helen Clark and recognition by UN Youth, UNICEF, and UN Women.



SECTION A

# Getting Started

# Why You Need the Toolkit: To Bridge the Gender Gap in Your Organization

As a leader in an organization committed to advancing girls' education, you're driven by impact. Yet, imagine discovering a critical gap: for ten years, your organization has never systematically examined whether its internal systems, structures, policies, and programs truly tackle gender inequalities. Are you unintentionally reinforcing inequities? Are you merely gender-sensitive, or are you truly pushing for deeper, systemic transformation?

This scenario highlights a common challenge: without a clear diagnostic, even well-intentioned efforts can fall short. If you find yourself uncertain about how to bridge this crucial gap, this toolkit is your starting point.

It's designed for organizations, leaders, and practitioners who are ready to rigorously assess and strengthen their commitment to meaningfully advancing gender equality.

## What This Toolkit Includes:

To help you view your work through a gender lens, this toolkit provides clear, step-by-step guidance in these key areas:

**i KEY CONCEPTS**  
Understand foundational definitions of gender, gender equality, gender equity, and different types of gender diagnostics.

**v INTEGRATING RECOMMENDATIONS**  
Practical strategies for embedding diagnostic recommendations into your ongoing operations, ensuring lasting change.

**ii PREPARATION**  
Learn how to effectively prepare for and maximize the value of a gender diagnostic exercise tailored to your organizational needs.

**vi TOOLS & RESOURCES**  
Identify and utilize a range of conceptual and methodological tools to support every stage of your gender diagnostic.

**iii CONSULTANT ENGAGEMENT**  
Step-by-step advice on finding, selecting, and structuring the scope of work for a qualified consultant to lead your diagnostic.

**vii M&E INTEGRATION**  
Clarify the vital relationship between gender diagnostics and your existing Monitoring and Evaluation (M&E) processes

**iv PROCESS PLANNING**  
Gain insights into how to organize the entire gender diagnostic process, from inception to follow-through.

## Who This Toolkit Is For: All Gender Champions

Initially developed for Echidna Giving's grantee partners, this toolkit is adaptable for any education organization aiming to integrate a gender lens into its work. It is particularly valuable for:

- **Program Staff and Gender Focal Persons** to enhance your capacity to drive gender mainstreaming.
- **Human Resources (HR) and Monitoring and Evaluation (M&E) Teams** to learn to apply a gender lens to your internal systems and data.
- **Leadership Teams** to strategically prioritize and embed gender equality at the highest levels.
- **Advocacy Networks, Research Institutions, and Community-Based Organizations** to modify and utilize this resource to suit your specific needs and contexts.

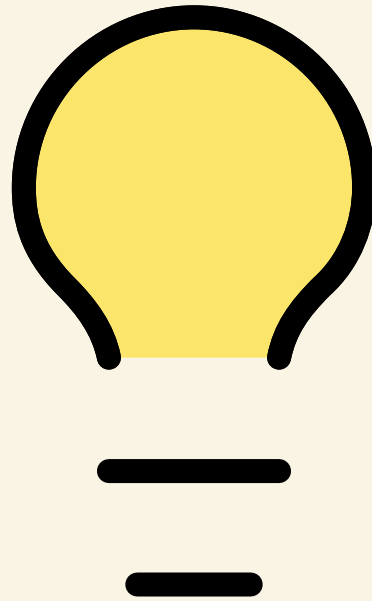
## How This Toolkit Is Organized: A Structured Journey

This toolkit guides you through a clear, three-section journey, complemented by practical annexes:

- **Section A: Getting Started** offers a brief overview of the toolkit's purpose and contents – your quick tour
- **Section B: Understanding Gender Diagnostics** establishes the conceptual foundation for this work. It frames the diagnostic as a strategic process, defines key methodologies, and explores their role in advancing gender equality. Crucially, it demonstrates the vital connection between these tools and Monitoring and Evaluation (M&E) systems
- **Section C: The 5-Step Gender Diagnostic Process** offers a practical, step-by-step guide on how to prepare, plan, and execute a gender diagnostic exercise that is appropriate, relevant, and impactful for your organization.
- **Annexes** provide seven practical tools – including templates and checklists – to equip and sustain your journey toward gender transformation.

We are committed to continuously updating this toolkit, incorporating new learnings from Echidna Giving's partners and all those who utilize it to meaningfully advance gender equality.

Refer to page 38 for the feedback form.



SECTION B

# Understanding Gender Diagnostics

To understand 'gender diagnostics', it is important to first seek clarity on the concepts: gender, gender equality, and gender mainstreaming. If you're in the education sector and want to bring a gender perspective into your work, grasping these concepts is a crucial first step for you to achieve results. In the following sections, each concept is clarified, and common types of gender diagnostics are explained.

## Gender

Gender is an evolving concept. Traditionally, it was about the social-cultural classification of people into two groups: women and men, which we call 'binary gender'. But with the feminist movement, the definition has expanded to include a wider range of gender-diverse identities. Societies and cultures have unwritten rules, called **gender norms**, about how people of different genders are expected to behave. From an early age, children are socialized into what is considered 'masculine,' 'feminine,' or other culturally recognized expressions of gender, shaping roles, access to power, and access to resources. Gender norms are not fixed; they vary across cultures and over time, intersecting with other social factors such as race, class, sexuality, ability, or age, they can produce inequalities. Importantly, **gender** is distinct from **biological sex**, which refers to the classification of individuals based on physical characteristics such as chromosomes, hormones, and reproductive anatomy. Biological sex includes categories such as male, female, and intersex, though not all societies formally recognize intersex individuals.

## Gender Equality, Equity, and Parity

Gender equality, gender equity, and gender parity are closely related, but not synonymous terms. The difference between these terms lies in their focus: Deeply rooted in the universal principle of human rights, gender equality represents the desired final state where all genders have equal power and opportunities. Gender equity is the practical strategy, involving the concrete actions, policies, and resource allocations needed to overcome systemic barriers and reach that goal. It is about addressing historical disadvantages and leveling the playing field, which is absolutely essential to achieve the ultimate goal of gender equality. Finally, gender parity focuses on numbers; it simply refers to equal numbers or representation of different genders, for example, in educational leadership, or in staffing, or in enrollment. Figure 1 presents definitions of the three concepts.

Figure 1: Defining gender equality, gender equity, and gender parity



These three concepts, as depicted in Figure 2, may be seen as a hierarchy: gender equality as the overarching goal, gender equity as the means or strategy to achieve equality, and gender parity as one measurable indicator of progress.

Some organizations focused on social justice may give equity (not necessarily gender equity) a higher order of importance than equality, arguing that without targeted, equitable policies, equality remains an unattainable ideal for those who are most marginalized. Equity is often prioritized over equality because it is viewed as the necessary, practical solution for addressing historical and systemic disadvantage. While this is true, it does not diminish the fact that equity serves as a means to a larger goal: achieving genuine equality. It is seen as the only effective way to make progress toward that ultimate goal.

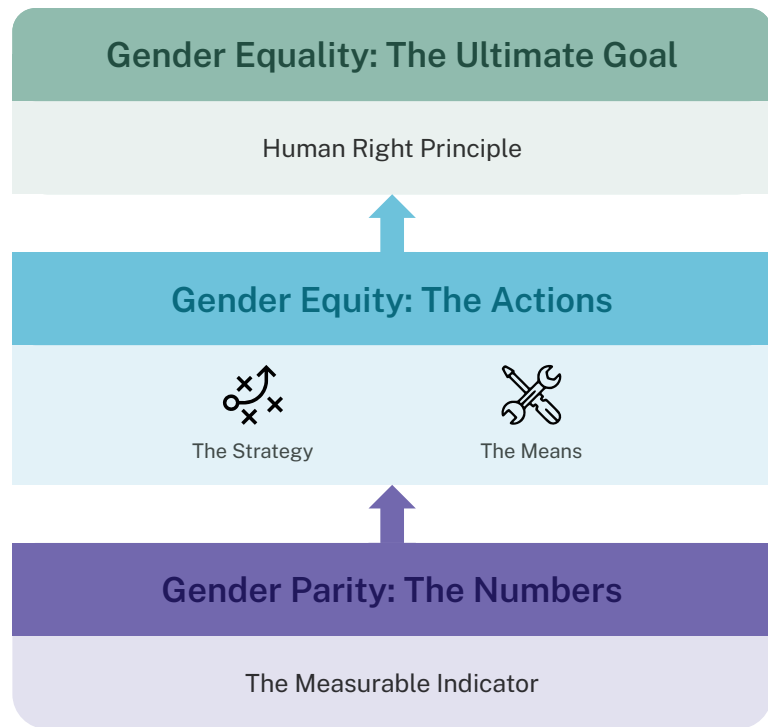


Figure 2: Hierarchy of Gender Equality, Gender Equity and Gender Parity.

## Gender Mainstreaming: Embeds Gender

Gender mainstreaming is all about making gender equality a core part of everything an organization does, from its big-picture policies to its daily tasks. It's about making sure that everyone's needs and experiences — girls, boys, women, men, and gender-diverse individuals — are thought about at every step. The goal is to create policies and environments that work for everyone, helping to reduce inequality.

Think of it this way: policies and programs aren't neutral; they can affect different genders in different ways. Gender mainstreaming helps check policies and programs to see if they're fair and pushes for considering gender from the very beginning. As a strategy, it means always thinking about gender when designing, carrying out, checking, and evaluating any activity to make sure everyone's concerns are heard and equality is achieved.

## Gender Diagnostics: Guides and Informs Gender Mainstreaming

Gender diagnostics<sup>1</sup> is an umbrella term for tools and processes that guide and inform gender mainstreaming. It provides strategic clarity on an organization's current standing in advancing gender equality. It also supports intentional planning to address gaps and promote equitable outcomes for all

<sup>1</sup>The term 'gender diagnostics' is a collective noun in the present context, hence the use of the singular pronoun 'it' and verb 'is'.

genders. At its core, it's an evidence-based analytical approach that uses an intersectional feminist<sup>2</sup> lens to explore roles, relationships, power dynamics, and opportunities within a given context. It systematically uncovers social norms, institutional practices, and structural barriers that might be holding back gender equality. Going beyond just sex-disaggregated data, it assesses how various overlapping social identities contribute to marginalization of individuals within schools, communities, and workplaces.

**Although participatory approaches are widely valued for the way they foreground the voices of marginalized groups, not all gender diagnostics rely on fully participatory methods. Many also use non-participatory methods such as desk reviews, policy analysis, and quantitative data assessments that examine trends, patterns, and disparities. Semi-participatory methods may also be used, including semi-structured interviews, structured focus group discussions, and surveys that gather stakeholder perspectives without requiring co-creation of the diagnostic process.** Through analyzing how gender roles, relations, and inequalities shape a specific context, gender diagnostics pinpoint strengths, gaps, and opportunities for integrating gender into policies, programs, budgets and into institutional cultures. They also establish a baseline for gender-responsive monitoring, evaluation, research, and learning.

*Ultimately, gender diagnostics seek to **reveal disparities and generate insights** that lead to more **equitable, inclusive, and effective interventions**.*

Research proves gender-equal leadership boosts financial performance, innovation, and overall organizational and program effectiveness<sup>3</sup>. Gender diagnostics is crucial for accountability and a powerful way to foster gender equality. Systems aren't neutral; they often perpetuate historical inequities, making deliberate adaptation essential. A solid gender diagnostic breaks down barriers, rebalances power, and creates an environment where everyone can thrive. The diagnostics offer significant value beyond mere compliance. They also optimize resource allocation by aligning budgets with impactful interventions. Furthermore, they enhance credibility and accountability, demonstrating a genuine commitment to gender justice. Finally, diagnostics are vital learning opportunities, encouraging self-reflection and innovation within teams.

## What are the most common types of Gender Diagnostics?

There are different types of gender diagnostics. Choosing the right diagnostic type is key to obtaining relevant and actionable findings. This Toolkit highlights four main ones: gender analysis, gender assessment (which can be further split into gender needs assessment and gender impact assessment), gender review, and gender audit. Reference is also made to the gender impact assessment without delving deep into it. You might hear these terms used interchangeably, and while they're similar and connected, they're not the same. Each one has its own distinct scope and purpose. You must familiarize yourself with them to help you decide which type of diagnostic is most appropriate for your organization at any moment in time.

<sup>2</sup> Lewis & Clark College (2026) *ABC's of Social Justice*. Department of Inclusion & Multicultural Engagement. Available at: [www.lclark.edu/live/files/18474-abc-of-social-justice](http://www.lclark.edu/live/files/18474-abc-of-social-justice) (Accessed: 14 January 2026).

<sup>3</sup> Smith, G. (comp.) (2017) *The Business Case for Gender Diversity*. International Center for Research on Women (ICRW). Available at: [www.icrw.org/wp-content/uploads/2017/10/Advisors-The-Business-Case-for-Gender-Diversity.pdf](http://www.icrw.org/wp-content/uploads/2017/10/Advisors-The-Business-Case-for-Gender-Diversity.pdf) (Accessed: 14 January 2026).

# A Guide to Gender Diagnostic Tools

Systematic tools used to identify inequities, assess needs, and evaluate progress toward gender equality.



## Gender Analysis: Foundational Step

A systematic process of identifying and grasping the different roles, needs, and power dynamics between genders. Within gender analysis, gender mapping is a specialized analytical tool used to visualize and identify specific gendered patterns.

### METHODS

- **Non-participatory:** Desk reviews of policies, curriculum materials, national datasets.
- **Semi-participatory:** Semi-structured interviews, focus groups with teachers, parents, community members.
- **Fully participatory:** Community mapping, gender role mapping with students, participatory power analysis workshops.
- Analyze program content to examine how materials reflect or challenge gender norms and power relations.

### EXAMPLES

- **Gender bias in textbooks:** Analyze national primary textbooks to identify gender stereotypes in character roles, language, images, and representation.
- **School Leadership Power Mapping:** Map school district authority structures to identify gender-based decision-making regarding resources and policy implementation.
- **Community Roles Study:** Study how gendered expectations of children's labor outside school affect attendance and retention rates.



## Gender Assessment: Situation Analysis at Baseline

Building on gender analysis, this process identifies barriers and needs before planning action to prevent unintended negative effects and promote equality. It includes Gender Needs Assessment and Gender Impact Assessment to evaluate potential effects of policies or programs.

### METHODS

- **Non-participatory:** Quantitative baseline surveys, policy reviews, administrative data analysis.
- **Semi-participatory:** Structured interviews, school-based surveys, stakeholder focus groups.
- **Fully-participatory:** Safety walks, co-analysis workshops with teachers, students, and communities.
- Program content can be analysed to identify exclusionary assumptions, unequal learning outcomes, or potential gendered impacts before program rollout.

### EXAMPLES

#### Needs assessment:

- **Assessment of teachers' strategic needs:** Survey mapping gender-based professional development needs for public school teachers, focusing on leadership and balance.
- **ECD gender norms and resources needs assessment:** A participatory study examining how ECD staff can promote gender equity and challenge classroom stereotypes.
- **School Safety Needs Assessment:** Students and staff identify gender-specific safety and hygiene barriers prior to implementing planned school infrastructure improvements.

#### Impact assessment:

- **Impact assessment of a capitation model:** A survey to assess the impact of a set, per-student fee funding model on access to school for girls, boys, and gender diverse children in remote and marginalized areas.
- **Sports-based life skills program impact assessment:** A baseline and endline study to determine the potential impact of a new sports-based life skills curriculum on key outcomes for girls, such as self-efficacy, school retention, and the reporting of school-related gender-based violence (SRGBV).



## Gender Review: *Periodic*

A periodic, less formal check to confirm that gender considerations are integrated into project lifecycles and reporting, while pinpointing areas where inequities continue to persist.

### METHODS

- **Non-participatory:** Review of monitoring data, project reports, financial records.
- **Semi-participatory:** Reflection meetings, structured beneficiary surveys.
- **Fully participatory:** Joint project reflection workshops with teachers, students, or community groups to identify adjustments.
- Review program content to ensure alignment with gender commitments and identify improvements.

### **Midterm review of sexual literacy project in primary schools:**

Mid-term evaluation of a four-year teacher sexual literacy project analyzing gender impacts on access, participation, benefits, decision-making, policy content, and resource distribution.

**Grant portfolio review:** Review five years of education grants to assess if projects integrated gender-intentional and transformative approaches, rather than merely gender-responsive ones, ensuring alignment with equity goals.



## Gender Audit (Organizational): *In-Depth Evaluation*

Comprehensive, formal check on how well gender equality is institutionalized, ensuring compliance and accountability.

### METHODS

- **Non-participatory:** Review of HR files, internal policies, recruitment and promotion data.
- **Semi-participatory:** Anonymous surveys, focus groups.
- **Fully participatory:** Staff-led culture assessments, participatory organizational self-evaluation workshops, collaborative recommendation development.
- Review program systems, policies, capacities, and accountability mechanisms that shape content design and implementation indirectly.

**HR Policy and Practice Audit:** A systematic examination of an education non-profit's internal Human Resources policies (e.g., recruitment, promotion, parental leave, anti-harassment guidelines) to determine if they are aligned with and actively promoting gender equality in the workplace.

**Organizational Culture Audit:** An internal diagnostic using surveys and focus groups to assess the institutional culture, focusing on perceptions of equitable leadership, decision-making processes, and whether staff feel free from gender-based discrimination or bias.



## Gender Audit (Project/Program): *In-Depth Evaluation (Program Level)*

Systematic review of how gender equality commitments are operationalized across program design, delivery, and learning.

### METHODS

- **Non-participatory:** Review of program designs, curricula, MEL frameworks, budgets.
- **Semi-participatory:** Interviews with program staff and partners.
- **Fully participatory:** Co-review workshops with implementers and participants.
- Analyze program content — curricula, materials, tools — to assess gender responsiveness and transformation across all communication and training resources.

### EXAMPLES

**Program Design and Materials Audit:** Audit physics textbooks to evaluate how male and female representation influences student performance and aspirations in science.

**Cross-program gender audit of an education portfolio:** Evaluate education initiatives to identify systemic gaps, standardize gender-responsive indicators, and ensure diverse vocational opportunities across sectors.

## Assessing Gender Integration: Two Frameworks

The gender equality continuum is an analytical framework and diagnostic tool used in gender mainstreaming. It categorizes approaches from harmful to transformative, helping organizations understand the degree to which gender is integrated into their work. While continuums and gender markers differ, they both use tiered scales to support reflection, assessment, and improvement in gender integration. For ease of shared vocabulary with Echidna Giving’s partners, we are using Echidna Giving’s Gender Marker as the primary visual and explanatory tool in this section. The Echidna Gender Marker progresses from Gender Unintentional to Gender Transformative and is designed to spark reflection rather than serve as a rating system. It supports organizations in locating where they currently sit and identifying steps toward deeper integration of a gender lens. Figure 3 visually represents this continuum.



Figure 3: Echidna's Gender Marker 2.0

Figure 3 presents Echidna’s Gender Marker 2.0, which distinguishes four levels: Gender Unintentional, Gender Responsive or Aware, Gender Intentional, and Gender Transformative. This marker complements the broader logic of a gender equality continuum, while offering clearer guidance on how organizational practices, capacities, and program designs evolve across the different levels of gender integration.

A note on language: Many gender equality continuums historically included a category titled Gender Blind. To avoid ableist framing that equates blindness with a lack of awareness, we do not use the term. The Echidna Gender Marker begins with Gender Unintentional, a more accurate and inclusive

term that reflects the absence of consideration for gendered barriers while avoiding stigmatizing language.

Together, the continuum<sup>4</sup> and the Echidna Gender Marker support teams and partners in deepening their understanding of gender integration, identifying entry points for improvement, and assessing the extent to which programs and organizations move toward gender transformative outcomes.

## The Relationship Between Gender Diagnostics and M&E

As Figure 4 demonstrates, gender diagnostics are crucial for monitoring and evaluation (M&E). They help examine how gender dynamics influence program design, implementation, and outcomes. M&E provides the framework, while gender diagnostics offers the lens to ensure a gender-responsive process. Without it, M&E can be "gender-neutral," overlooking differential impacts on various gender groups and leading to skewed results. Gender diagnostics prevent this by:

- ➔ Establishing a baseline of existing gender relations, norms, and inequalities, crucial for project and M&E framework design.
- ➔ Developing indicators beyond simple sex-disaggregated data to measure changes in power, decision-making, and resource access relevant to gender equality.
- ➔ Ensuring the entire M&E process, from data collection to reporting, is gender-sensitive, potentially using qualitative methods and training data collectors on gender biases.

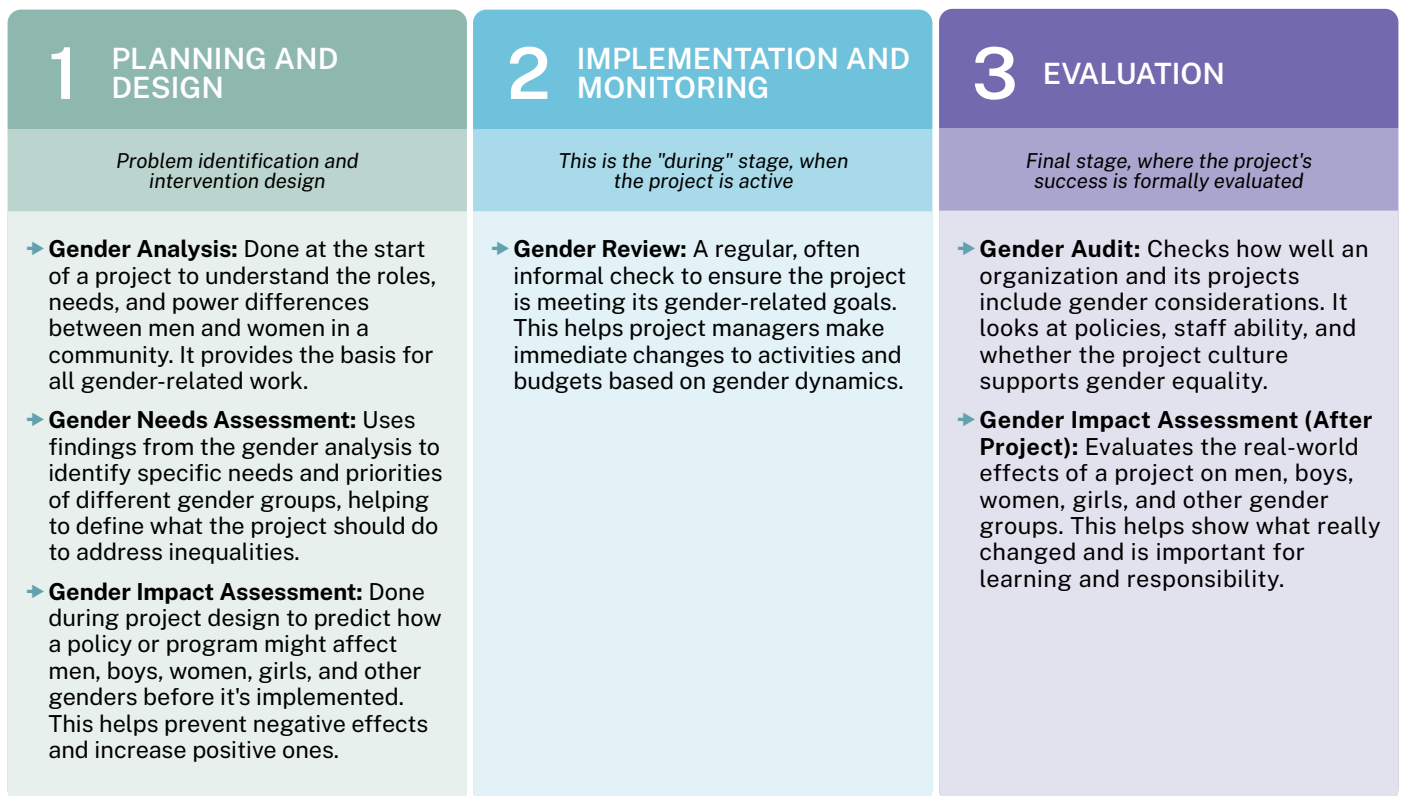
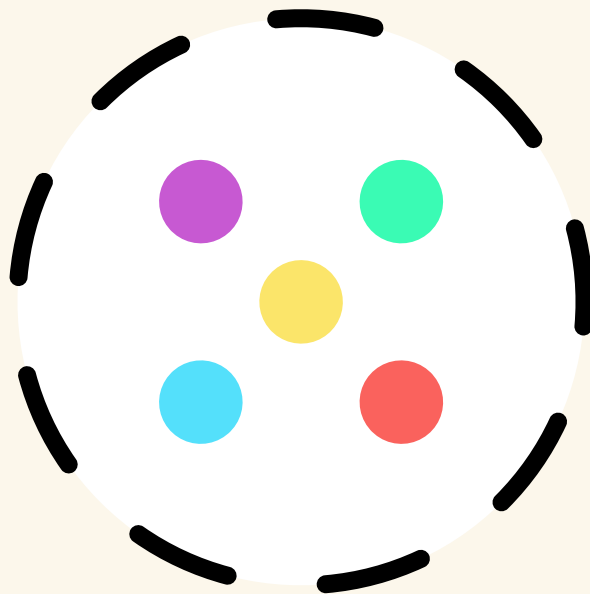


Figure 4: Relationship between M&E Stages and Types of Gender Diagnostics

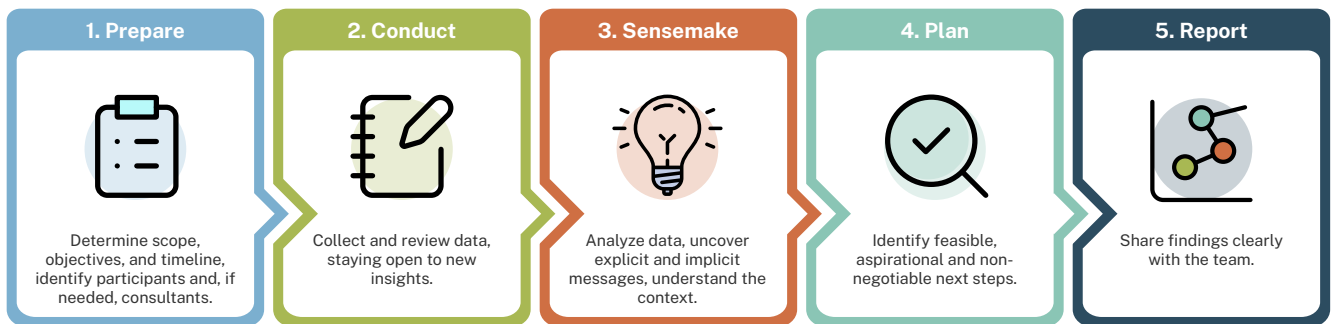
<sup>4</sup> Mathers, N., et al. (2024) *Applying the Gender Integration Continuum to Social Protection*. UNICEF Innocenti. Available at: [www.unicef-irc.org/publications/pdf/Applying-the-Gender-Integration-Continuum-to-Social-Protection.pdf](https://www.unicef-irc.org/publications/pdf/Applying-the-Gender-Integration-Continuum-to-Social-Protection.pdf) (Accessed: 14 January 2026)



## SECTION C

# The 5-Step Gender Diagnostic Process

Having reviewed the preceding information, you should now have a good understanding of the various diagnostic processes and an initial sense of your organization's specific requirements. The five steps outlined below are universal across all diagnostic types. Each step is detailed on the subsequent pages, with additional information, including potential pitfalls and mitigation strategies, provided in the appendices (see Annex A).



## Step 1. Prepare

A successful gender diagnostic requires thorough, collaborative preparation that is participatory, co-designed, and inclusive. This groundwork ensures ownership and relevance across the team, making the diagnostic a strategic tool for strengthening gender integration and advancing equality. As the designated staff for this task, you will need to be both reflective and action-oriented, with ample preparation and deliberate groundwork being key to their success.

### Preparing a well-defined scope

A well-defined scope is vital to ensure the diagnostic is both purposeful and manageable. It involves clearly stating the overall goal, who the diagnostic is for, and the desired outcomes, as outlined in the terms of reference (ToR). More specifically, it incorporates the detailed steps for implementation and reporting on results within the scope of work (SOW). If the scope is too broad, the review can become unfocused, while if it is too narrow, critical gaps may remain. The scoping stage ensures a balance between depth and practicality.

#### Box 1. Key Questions to Guide Scoping

- ➔ **Purpose:** What is the primary goal (e.g., compliance, improving gender mainstreaming, or addressing specific gaps)?
- ➔ **Type of diagnostic:** Which type of diagnostic most closely matches your purpose?
- ➔ **Coverage:** Which parts of the organization, projects, timeframes, and stakeholder groups will be included?

### Defining the scope of the diagnostic

You need to clarify right at the beginning, the purpose and rationale for the diagnostic, determine

what type of diagnostic would best suit the purpose, and what the diagnostic should cover. (See Box 1 for some guiding questions).

A rapid internal needs assessment, which includes a desk review of relevant program documents and informal discussions with strategic staff, will help answer the scoping questions. For instance, the HR officer can provide valuable insights into gender-related HR policies and practices (e.g., recruitment, promotion, parental leave), highlighting potential gaps or areas for improvement, in addition to guiding you on the content for the ToR and SoW. The M&E officer can help identify existing data sources or gaps in gender-related information. Enlisting their support as allies, rather than just sources of information, will be beneficial.

## Identifying human resource needs

Though this seems like an HR function, you would need to provide both management and HR with what human resources would be needed to be able to execute the gender diagnostics effectively. Who, apart from yourself, will form the core gender diagnostics team from your organization? Will you need to bring on board external expertise? And if yes, how will you decide on suitability? The findings of the needs assessment done in the stage of scoping should help ground your recommendations and give credibility to your arguments.

When recommending who should conduct the diagnostics, your director will need to weigh the pros and cons of an internal versus external approach. External consultants offer fresh, unbiased perspectives, specialized knowledge, and a safe space for sensitive discussions, but may not have enough context of the organization or local realities. Internal reviews can save money and leverage existing knowledge, but they may carry risks of bias and privacy concerns.

To mitigate these risks, it's best to involve staff throughout the process, commit to implementing recommendations, and build internal skills. Often, a hybrid approach — training an internal team supported by an external specialist — is most effective, combining internal ownership with objective expertise, though this is not the only way a gender diagnostic exercise can be carried out. (Annex B provides a comparison of the pros and cons of hiring an external consultant). This approach is especially useful for organizations too small to form a dedicated gender diagnostics team.

### Identifying the internal team

- a. Ideally, when identifying internal staff, you should aim to prioritize individuals with a solid understanding of gender concepts, institutional influence, and a commitment to gender equality principles. The team should be diverse, representing different departments and perspectives. While this is the ideal, the reality on the ground may be very different. Your proposal for the internal gender diagnostics team (its **size and composition**) must be **realistic** and grounded in your specific organizational context. A common challenge is a **lean staff** who are already **overwhelmed** by competing priorities, making it hard to spare time for new initiatives. Furthermore, internal gender expertise within your organization may be limited; for example, though you have been designated as the gender focal person, you may have no formal training in this area having gained your knowledge entirely through on-the-job experience. Therefore, the

**size and composition** of the team you propose to management must reflect these genuine capacity constraints.

- b. Select individuals who are adept at constructive dialogue and sensitive discussions, prioritizing persuasion over confrontation in their communication and transformative approaches.
- c. Ultimately, remember that a balanced internal team increases institutional ownership and strengthens capacity for sustainable follow-up.
- d. If you can't form a dedicated internal team, enlist help from strategic allies. Your strategic allies are staff with the authority to champion findings, board members committed to gender equality, and others with institutional influence who can translate recommendations into action. If you can constitute an internal team, it is recommended that they are gender diverse and intergenerational. Propose staff who have complementary skill sets and strengths, including strong knowledge of gender concepts and the institutional policies.

## Identifying external expertise: how do you onboard the right consultant?

### Box 2. Choosing the Right Consultant: What to Look For

1. Deep and practical understanding of gender equality, intersectionality, and education.
2. Ability to adapt global gender frameworks to local realities and contexts.
3. Skill in simplifying complex terminology and using persuasive communication to foster accessibility and reduce resistance.
4. Proficiency in facilitating inclusive engagement processes with diverse staff and stakeholders.
5. Capacity to ensure gender analysis tools are practical, usable, and adaptable to organizational realities, moving beyond academic approaches.
6. Aptitude for anticipating and strategically addressing resistance to change, framing gender work as equitable for all.
7. Ability to support integrating processes into broader organizational plans and M&E frameworks, recognizing gender transformation as a sustained effort.

It is essential that you, with support from HR, select the right external experts, if you choose to have external expertise within your exercise. A well-chosen consultant or consultancy team should be viewed as an ally and not an adversary: one who becomes a partner in organizational growth.

- a. There are many ways that you can “shop” for consultants. Of course, your organization will have its procurement policy and procedures that you must follow, including public advertisement for the opportunity. However, you may wish to headhunt, reaching out to funders, networks, and alliances for their recommendations. Echidna, for example, has a roster of gender experts and consultants from East Africa and India, which would be useful. You may also review online directories and resources like LinkedIn groups and research consortia to hunt for suitable consultants.
- b. It is important that you do credibility tests and reference checks. Request recent outputs, such as previous samples of audits (not just CVs). Check for: Does the candidate have a track record of recommendation uptake, that is, do they have examples where their recommendations led to actual gender integration? Beyond

that, is the methodology that they used appropriate and ethical? Are the findings and conclusions credible? Do the recommendations emerge from the findings, or are they a cut-and-paste job? Are they linked directly to the evidence and data presented? Ask not only about deliverables but also about their collaboration style and ability to handle sensitive issues.

Beyond these considerations, also evaluate how well the consultant aligns with your organizational culture and values. Consider their skills for capacity-building – can they transfer knowledge and skills to your internal team, leaving a lasting impact? Look for flexibility in approach, openness to feedback, and experience in organizations of similar scale or sector. Finally, ensure the consultant demonstrates an understanding of intersectionality and inclusion beyond gender, so recommendations address multiple dimensions of equity. Box 2 highlights some key qualities that you should look for in selecting an appropriate consultant, tailored to your needs.

## Strategizing leadership and team buy-in

Leadership endorsement and broad team buy-in are crucial for success. Without them, you may face resistance, given the sensitivity of the subject matter. Resistance may be reflected in the reluctance to allocate funds for the exercise, in the rejection of the findings, and in the non-acceptance of the recommended actions.

### Promoting buy-in

- a. The participatory needs assessment process and outcomes, combined with the alliance with influential individuals from within (board members or senior colleagues), can help to promote buy-in.
- b. Proactively frame gender equality as integral to organizational effectiveness.
- c. Create safe spaces for dialogue, address resistance, and confront misconceptions – such as the idea that gender work is only about women – to build a broader base of support.

## Preparing a Scope of Work for a Gender Diagnostic in an Education Institution

A clear Scope of Work (SOW) ensures shared expectations between the institution and the consultant (if you are onboarding one) conducting the gender diagnostic. It defines what will be assessed, how the work will be carried out, and what outputs are expected. A strong SOW helps guarantee that the diagnostic is thorough, ethical, and actionable, and that it reflects the realities of the education sector.

### Guidance for preparing a Scope of Work

1. Purpose: Describe why the diagnostic is being commissioned.

#### Examples

- a. To identify gender barriers affecting students' access, participation, safety, or learning
- b. To examine how gender shows up in teaching and leadership
- c. To inform a new gender strategy or improve programming
- d. To establish a baseline for measuring future gender-related progress

## 2. Scope: Define which aspects of the institution will be examined.

### **Examples**

- a. Institutional policies, leadership structures, and strategy
- b. Classroom practices, pedagogy, and learning environments
- c. Curriculum and teaching and learning materials
- d. Student attendance, retention, learning levels (e.g. Early Childhood Development, Foundational Learning)
- e. School-Related Gender-Based Violence (SRGBV) response systems and safeguarding
- f. Community and caregiver engagement
- g. Staff capacity, HR practices, and organizational culture
- h. Levels of inclusion for students with intersecting identities (disability, caste, language, religion, ethnicity, socio-economic background)

## 3. Methodology: Outline methods the consultant should use.

### **Examples**

- a. Document review
- b. Sex- and age-disaggregated data analysis
- c. Interviews with leadership, teachers and staff
- d. Focus groups with students and caregivers
- e. Classroom observations
- f. Participatory tools (e.g. power mapping, daily time-use exercises, safety mapping)
- g. Validation workshop with staff and leadership
- h. Clarify non-negotiables such as safeguarding, consent, and confidentiality.

## 4. Deliverables

### **Examples**

- a. Inception report
- b. Diagnostic framework and tools
- c. Comprehensive gender diagnostic report
- d. Strengths and gaps summary
- e. Prioritized action plan
- f. Presentation of findings
- g. Recommendations for ongoing monitoring

## 5. Timeline

Include a realistic timeline with milestones. Placeholders can be added, for example: [Insert number of weeks], [Insert key deadlines], [Insert review periods].

## 6. Roles and Responsibilities

Describe what the consultant is responsible for and what the institution will provide (access to data, interview scheduling, translators, etc.).

## 7. Consultant Qualifications: List the required knowledge and experience.

### **Examples**

- a. Gender expertise in education
- b. Experience with early childhood, foundational learning, SRGBV, and/or related areas
- c. Strong qualitative and quantitative research skills
- d. Knowledge of intersectional feminist approaches
- e. Experience working with schools, teachers, and communities
- f. Commitment to safeguarding and ethical engagement with children.

## What to look for when onboarding a Consultant

- 1. Technical Competence.** Look for expertise in:
  - a. Gender equality and education
  - b. Organizational assessments
  - c. Gender-responsive pedagogy
  - d. SRGBV and child protection
  - e. Education contexts
  - f. Understanding of education systems and school operations
- 2. Methodological Strength.** Ensure they can:
  - a. Design and apply rigorous research tools
  - b. Gather data ethically with children and adults
  - c. Analyze both organizational systems and social norms
  - d. Use participatory methods without being extractive
  - e. Tailor tools for marginalized and vulnerable groups
- 3. Values and Approach.** Seek someone who:
  - a. Aligns strongly with your organizational values
  - b. Respects community knowledge
  - c. Can facilitate sensitive discussions
  - d. Is collaborative and communicates clearly
- 4. Optional: Deliverable Quality.** Review past reports for clarity, coherence, depth, and actionable recommendations.

A sample Scope of Work you can use is available in the Annex.

## Step 2. Conducting the Diagnostics

If a decision is taken to contract an external consultant, one of their tasks would be to facilitate the development of a well-structured design that aligns with the type of diagnostic that your organization has decided to undertake. You will be part of the process, actively contributing to the co-creation of the design and supporting the logistics.

Additionally, as the focal person for the diagnostic, you have an oversight role to play. It is recommended that you have at least some idea about the key design elements, including the tools, associated with each of the diagnostic types. Table 1 explains in more detail four types of diagnostics. It provides guidance on the purpose of each, and specifies “when” it should be used, the common methodologies associated with them, and key data requirements.

*Table 1. Which type of gender diagnostic to choose*

Process	When	Purpose	Common Methods & Tools	Key Data Requirements
<b>Gender Analysis</b>	At the design and planning stage of programs, policies, or projects, they can be revisited during implementation or evaluation.	Provides baseline evidence on gender gaps, roles, needs, and constraints to ensure interventions respond to actual inequalities.	Gender mapping, surveys, interviews, focus groups, observations, document review, statistical analysis, and use of Gender Analytical Frameworks (GAF).	Sex-disaggregated data (quantitative); qualitative insights (experiences, perceptions); context-specific information.
<b>Gender Assessment</b>	At program inception, mid-term, or end-line evaluations; often donor-required.	Evaluates how well gender has been integrated in policies, strategies, or programmes; measures alignment with gender objectives and recommends adjustments.	Surveys, interviews, focus groups, observations, document analysis, process analysis, statistical analysis.	Sex-disaggregated data (e.g., loan volumes, participation rates, pay gaps); evidence of gendered impacts; policy options and actions.

Process	When	Purpose	Common Methods & Tools	Key Data Requirements
<b>Gender Review</b>	At the early stage of programming or policy reviews, also useful mid-cycle for rapid appraisal.	Provides a quick scan of how gender is considered in existing frameworks, documents, or activities; identifies gaps and entry points.	Document review, feedback on reports, monitoring visits, and meta-analysis of evaluations.	Project documents, M&E reports, and gender equality policy compliance checks.
<b>Gender Audit</b>	Periodically (every 2–5 years), especially during institutional reforms, strategic planning, or organisational strengthening.	Assesses an organisation's internal capacity, policies, staffing, culture, and accountability mechanisms for gender equality.	Desk review of documents, consultations (interviews, FGDs, surveys), tabulation and analysis of collected data.	Organizational policies, programs, budgets, HR data (sex-disaggregated); data on policy objectives and implementation.

*A note on gender mapping.* To help you get a clear picture of your field, this gender analysis tool maps out existing resources, initiatives, policies, and stakeholders related to gender within a specific sector or geographical area. It's a powerful way to see where efforts are overlapping, where gaps remain, and where new opportunities for working together might be hiding.

### Designing gender diagnostics

Once the appropriate diagnostic approach has been identified, the next step is to design the gender diagnostic. This phase may be led by an internal team (such as programs, MEL, or gender leads) or by an external consultant, depending on organisational capacity, scope, and intent. Designing the diagnostics involves answering four key questions:

- a. What do we need to know?** Define the core objectives and learning questions of the diagnostic. These should be specific, measurable, and aligned with the broader goals of gender integration and equity. At this stage, the team working on the gender diagnostics must conduct a **needs assessment** to identify key gaps, priorities, and the information most critical for the diagnostic. Consider both structural issues (policies, systems, practices) and programmatic issues (content, participant outcomes).
- b. How will we collect the data?** Identify the most suitable methods based on the information needed and the context in which you are working. Methods may include surveys, interviews, focus groups, document reviews, observations, or participatory workshops. Ensure methods are inclusive and accessible, considering language, literacy, cultural context, and intersectional perspectives.
- c. Who should we reach out to?** Select participants to ensure a diversity of perspectives, including leadership, staff at all levels, program participants, and external stakeholders where relevant. Consider who holds formal power versus lived experience, and ensure marginalized or underrepresented voices are included to capture a comprehensive picture.
- d. When will data be collected, and for how long?** Develop a timeline that balances the need for thoroughness with minimizing disruption to ongoing operations. Include milestones for interim check-ins, data validation, and reflection sessions to ensure the process is iterative and responsive. Plan for time to analyze data and incorporate feedback before final reporting.

### Selecting appropriate tools

Selecting the appropriate tools for different types of gender diagnostics is a critical step that ensures the diagnostic is effective, efficient, and yields relevant insights. It's not a one-size-fits-all approach.

What tool you choose will depend on the diagnostics’ purpose, scope, and available resources. Table 2 summarizes the different types of gender diagnostics, along with their typically associated methodological tools.

Table 2: Type of gender diagnostic by associated methodological tools

Type of Gender Diagnostics →	Gender Analysis (Foundational)	Gender Needs Assessment (Informs Program Design)	Gender Impact Assessment (Proactive Risk Assessment)	Gender Review (Health Check)	Gender Audit (Comprehensive Internal Review)
Tool Type ↓					
Document review					
Qualitative interviews					
Focus group discussions					
PRA/PLA tools					
Observations					
Life history/case study					
Household surveys					
Consultations/workshops					
Staff surveys					
Literature review					
Output analysis					

Document review and qualitative interviews are common methods used across all forms of gender diagnostics, as illustrated in the table above. Nevertheless, it is crucial to recognize the substantial variation that exists within these broad categories. For example, if you are doing a gender analysis, you would want to analyze existing assessments, demographic data, and service provision records. For a gender needs assessment, you would want to analyze demographic data and service provision records in addition to reviewing existing assessments.

A significant part of the gender diagnostics process involves a systematic review and analysis of organizational documentation. This work can be categorized by its focus and purpose:

- ➔ **Organizational Systems Review:** A broad Desk Review of Organizational Documents is foundational, encompassing policies (HR, financial, programmatic), strategic plans, job descriptions, annual reports, M&E frameworks, budget documents, and communication materials. This is used to understand the formal operational context of the organization.
- ➔ **Internal Equity Check (Gender Audit):** Specifically focusing on Human Resources, a Gender Audit involves detailed HR Data Analysis, such as reviewing recruitment, promotion, salary, and leave data, all disaggregated by gender.
- ➔ **Programmatic Integration (Gender Review):** The Gender Review focuses on project-specific documents, including project documents, reports, M&E frameworks, budget allocations, and meeting minutes, to find evidence of gender integration within project lifecycles.
- ➔ **Baseline and Needs Assessment:** For a Gender Needs Assessment or Gender Analysis, a Document Review focuses on existing assessments, demographic data, and service provision records to establish a baseline understanding of gender dynamics and needs.
- ➔ **Learning and Foresight (Gender Impact Assessment):** The Gender Impact Assessment

involves reviewing similar projects or policies to learn from past gender impacts and inform future planning.

## Step 3. Sensemaking: Analysis and Understanding the Findings

### Box 3: Bring the data together

Often, consultancy work plans provide very little time to make sense of the data, sometimes as little as two days. It pays dividends to invest in time. After data collection, consolidate and analyze all qualitative and quantitative data, ensuring diverse perspectives are included. Identify patterns and outliers. Apply an intersectional lens to understand how identities shape experiences. Triangulate findings from different sources to confirm accuracy and strengthen credibility. Finally, contextualize findings within the organization’s realities and local gender norms, grouping evidence thematically for deeper analysis.

## Key questions for analysis

In Table 3, some examples of broad thematic areas and questions are presented. The key questions should be co-created at the design stage and should be aligned to the specific gender diagnostic methodology selected.

Table 3. Sample questions for gender diagnostic analysis

Analytical Theme	Key Questions	How to find this
Alignment and Gaps	<ul style="list-style-type: none"> <li>To what extent do the organization’s policies, programs, and practices align with gender equality principles?</li> <li>In what specific areas do the organization’s policies, programs, and practices fall short of gender equality principles?</li> </ul>	<ul style="list-style-type: none"> <li>Review policy documents alongside implementation data to see if commitments translate into practice.</li> <li>Compare formal policies with staff and stakeholder experiences.</li> <li>Note where policies are silent on gender, don’t explicitly have any information, or unintentionally exclude certain groups.</li> </ul>
Access to resources and services	<ul style="list-style-type: none"> <li>Do all genders have equitable access to the opportunities provided by a project, policy, or institution?</li> </ul>	<ul style="list-style-type: none"> <li>Conduct surveys, interviews, and focus groups with diverse groups (women, men, girls, boys, gender-diverse individuals) to gather perceptions and experiences of access.</li> <li>Analyze sex-disaggregated data on participation rates, resource distribution, and service uptake.</li> <li>Review project/policy documents for explicit inclusion or exclusion criteria and their practical application.</li> <li>Observe program activities and physical spaces to identify any informal barriers to access.</li> </ul>
Participation	<ul style="list-style-type: none"> <li>What is the quality and nature of involvement of women and men, or girls and boys, in organizations programs and practices?</li> </ul>	<ul style="list-style-type: none"> <li>Collect sex-disaggregated data on participation rates in meetings, training, and decision-making bodies.</li> <li>Conduct observations of group dynamics in program activities to assess active involvement and voice.</li> <li>Use qualitative methods (interviews, focus groups) to understand the quality of participation — e.g., who speaks, whose ideas are valued, perceived influence.</li> <li>Analyze meeting minutes, attendance records, and project reports for evidence of inclusive participation and leadership.</li> </ul>
Decision making and power	<ul style="list-style-type: none"> <li>Who has the authority and influence to make final choices about planning, implementation, and resource use?</li> </ul>	<ul style="list-style-type: none"> <li>Review organizational charts, job descriptions, and policy documents to understand formal power structures.</li> <li>Conduct interviews with staff at different levels and external stakeholders to map informal power dynamics and influence networks.</li> <li>Analyze the gender composition of leadership positions, committees, and decision-making bodies.</li> <li>Examine resource allocation processes and budget documents to see who controls financial decisions and how gender-sensitive these decisions are.</li> </ul>

		<ul style="list-style-type: none"> <li>• Use participatory tools (e.g., power mapping exercises) to identify actors with significant influence.</li> </ul>
Root causes	<ul style="list-style-type: none"> <li>• What are the structural, cultural, or procedural causes of any inequalities identified?</li> <li>• Are they linked to policy gaps, implementation challenges, or deeper systemic norms and biases?</li> </ul>	<ul style="list-style-type: none"> <li>• Use probes to explore why disparities exist and triangulate with other sources and methods</li> <li>• Examine structural factors (e.g., recruitment processes, budget allocations) and cultural norms (e.g., leadership attitudes, informal practices).</li> <li>• Identify whether the issues stem from policy gaps, inconsistent application, or broader organizational or cultural inequities.</li> </ul>

## Spotlighting key emerging findings

Summarizing the main takeaways—ideally between three and five key points—from your gender diagnostic is incredibly important for making sure your work is clear, impactful, and leads to real change. Once the analysis is finished, take some time, together with the consultant and team members, to really look at what’s emerging. Focus on the issues that will have the biggest influence on fairness, inclusion, and how well your organization functions. Make sure you add it to the consultant’s ToR right at the beginning.

By concentrating on these most vital insights, you can effectively communicate complex information to a wide range of people, such as your leadership team, program managers, funding agencies, and even community leaders. Many of these individuals might not have the time or specialized knowledge to go through a full report. This approach also helps you strategically prioritize what needs to be done, acts as a powerful way to advocate for your cause, and encourages everyone involved to get on board and work together, which in turn speeds up the implementation of solutions.

## Step 4. Developing the Action Plan: What Next?

### Outlining key priorities

After reviewing findings, prioritize action plan areas based on organizational context. Consider cultural, political, legal, and internal factors like mission, programs, and existing initiatives to identify urgent, short-term, and long-term issues. Engage leadership, staff, and community partners to define priorities, ensuring all voices are heard. This localized approach creates a practical and successful roadmap.

### Translating findings to action

A gender diagnostic should not be for academic purposes or as a checking the activity box exercise. It has value only if its findings lead to concrete, sustainable change. Turning insights into action requires a structured plan that is realistic, time-bound, and owned by the organization. In the previous step, the gender diagnostic team already prioritizes emerging issues by impact, urgency, and strategic alignment. Categorize them into short, medium, and long-term goals. Next, develop a team consensus around clear, measurable objectives addressing both structural and cultural changes. Then, list specific actions, assign responsibilities, and integrate these into work plans for accountability. Advocate for the allocation of necessary resources, including budget and staff time, and securing leadership commitment.

*In collaboration with your M&E colleagues, set realistic timelines with milestones to track progress in consultation. Embedding them in the M&E plan will facilitate continuous monitoring and evaluation of effectiveness, and adaptation of strategies as needed. Finally, communicate progress transparently to maintain engagement and celebrate achievements, reinforcing commitment to gender equality. This ensures a results-oriented approach leading to sustainable organizational change.*

In Annex D, you will find a sample of a gender action plan template.

## Step 5. Reporting and Moving Forward

### Sharing your results

#### **Box 4: Tips for Impactful Reporting**

1. Identify audiences: Tailor findings to executive leadership, program teams, donors, and community partners, considering their needed level of detail.
2. Match format to use case: Use detailed reports for planning, action plans for accountability, and briefs/presentations for quick engagement.
3. Ensure confidentiality: Protect sensitive information.
4. Be realistic about capacity: Choose feasible formats.
5. Plan for follow-up: Enable progress tracking and sustained focus on gender equality.

Effective communication of your findings is critical to ensure that insights lead to meaningful organizational change. Reporting should be tailored to meet the needs of diverse audiences while maintaining clarity, accuracy, and actionable guidance. The following outputs are typically produced:

**Internal Report:** A comprehensive document with validated findings, evidence-based analysis, and prioritized recommendations. It should be written in reader-friendly language with data visualizations, and guide internal stakeholders.

**External Brief:** A succinct summary tailored for donors, partners, and external audiences. This brief highlights key findings, successes, and high-level recommendations, focusing on transparency and accountability while respecting sensitive information.

**Full Action Plan:** A detailed roadmap outlining concrete steps for addressing the review's recommendations, including timelines, responsible persons, resources needed, and monitoring indicators. This plan is critical for guiding implementation and sustaining momentum.

**Presentation and Dialogue Sessions:** Facilitate short, focused presentations with management teams, staff, and board members to discuss the findings, implications, and next steps. These sessions encourage feedback, foster ownership, and promote collective commitment to gender-transformative change.

## Final Words

In summary, by carefully tailoring reports and presentations to various audiences and by establishing a solid action plan with clear monitoring indicators, organizations can ensure that the insights gained from the gender diagnostic process translate into sustained commitment and tangible progress toward gender-transformative change. Equally important is the commitment to ongoing follow up through structured discussions that assess the material impact of the gender review on the organization. These discussions should examine not only whether recommendations have been adopted, but how they have influenced policies, programs, staffing practices, resource allocation, and the overall organizational environment. Regular check-ins also create space to identify emerging barriers, adapt strategies, and recognize areas where additional support or capacity strengthening may be needed. This continuous cycle of reporting, reflection, action, and follow up is essential for embedding gender equality within the organizational culture and for ensuring that the diagnostic process leads to meaningful, lasting impact.



ANNEXES

# Additional Resources

# Annex A:

## Pitfalls and Mitigation Strategies

Step	Pitfalls	Mitigation Tips
<b>1. Prepare</b>	<ul style="list-style-type: none"> <li>• To what extent do the organization's policies, programs, and practices align with gender equality principles?</li> <li>• In what specific areas do the organization's policies, programs, and practices fall short of gender equality principles?</li> </ul>	<ul style="list-style-type: none"> <li>• Review policy documents alongside implementation data to see if commitments translate into practice.</li> <li>• Compare formal policies with staff and stakeholder experiences.</li> <li>• Note where policies are silent on gender, don't explicitly have any information, or unintentionally exclude certain groups.</li> </ul>
<b>2. Conduct the Diagnostics</b>	<ul style="list-style-type: none"> <li>• Do all genders have equitable access to the opportunities provided by a project, policy, or institution?</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct surveys, interviews, and focus groups with diverse groups (women, men, girls, boys, gender-diverse individuals) to gather perceptions and experiences of access.</li> <li>• Analyze sex-disaggregated data on participation rates, resource distribution, and service uptake.</li> <li>• Review project/policy documents for explicit inclusion or exclusion criteria and their practical application.</li> <li>• Observe program activities and physical spaces to identify any informal barriers to access.</li> </ul>
<b>3. Make Sense – Analyze &amp; Understand</b>	<ul style="list-style-type: none"> <li>• What is the quality and nature of involvement of women and men, or girls and boys, in organizations, programs and practices?</li> </ul>	<ul style="list-style-type: none"> <li>• Collect sex-disaggregated data on participation rates in meetings, training, and decision-making bodies.</li> <li>• Conduct observations of group dynamics in program activities to assess active involvement and voice.</li> <li>• Use qualitative methods (interviews, focus groups) to understand the quality of participation – e.g., who speaks, whose ideas are valued, perceived influence.</li> <li>• Analyze meeting minutes, attendance records, and project reports for evidence of inclusive participation and leadership.</li> </ul>
<b>Decision making and power</b>	<ul style="list-style-type: none"> <li>• Who has the authority and influence to make final choices about planning, implementation, and resource use?</li> </ul>	<ul style="list-style-type: none"> <li>• Review organizational charts, job descriptions, and policy documents to understand formal power structures.</li> <li>• Conduct interviews with staff at different levels and external stakeholders to map informal power dynamics and influence networks.</li> <li>• Analyze the gender composition of leadership positions, committees, and decision-making bodies.</li> <li>• Examine resource allocation processes and budget documents to see who controls financial decisions and how gender-sensitive these decisions are.</li> <li>• Use participatory tools (e.g., power mapping exercises) to identify actors with significant influence.</li> </ul>
<b>Root causes</b>	<ul style="list-style-type: none"> <li>• What are the structural, cultural, or procedural causes of any inequalities identified?</li> <li>• Are they linked to policy gaps, implementation challenges, or deeper systemic norms and biases?</li> </ul>	<ul style="list-style-type: none"> <li>• Use probes to explore why disparities exist and triangulate with other sources and methods</li> <li>• Examine structural factors (e.g., recruitment processes, budget allocations) and cultural norms (e.g., leadership attitudes, informal practices).</li> <li>• Identify whether the issues stem from policy gaps, inconsistent application, or broader organizational or cultural inequities.</li> </ul>

## Annex B: Pros and Cons of External Consultants

Pros	Cons
<p>An external consultant is more likely to be objective and impartial as they bring an outsiders, unbiased perspective. This can be crucial for identifying systemic gender inequalities and structural issues that internal staff may overlook or be unwilling to challenge due to organizational politics or fear of repercussions.</p>	<p>The external consultant may have no or inadequate contextual grounding, which may contribute to superficial analysis or recommendations that are either difficult to implement or not relevant.</p>
<p>Consultants are selected for their specialized knowledge, technical capacity, and experience in gender diagnostics, which internal staff may lack. They can bring state-of-the-art tools and approaches.</p>	<p>If sufficient time is not given to the consultancy team and only a single data source is used (e.g. documentation review, or key informant interviews), it may result in generic and shallow recommendations that fail to address the underlying root causes of gender inequality.</p>
<p>Staff may feel more comfortable sharing sensitive information, challenges, and concerns (such as those related to discrimination or harassment) with an independent third party, as they perceive the consultant as having no vested interest in internal outcomes. They may also trust that the external consultant will keep confidential the information that staff share, leading to more honest and complete data collection.</p>	<p>Organizations may sometimes engage a consultant to be able to 'tick the box'. They may not be committed to taking gender transformative actions, or to developing internal capabilities for long-term gender mainstreaming. This can result in selecting a consultant, not so much for their expertise or experience, but someone who they perceive to be easily 'manageable', ready to do a 'quick' job without digging deep into the issues. If the consultant fails to provide a confidential space for staff to share concerns, the entire process may be compromised.</p>
<p>A report done by an external expert is perceived to be more authoritative and accepted by management as credible. This may potentially strengthen the case for management commitment and resource allocation to implement the report's recommendations.</p>	<p>If internal staff are not adequately involved in the process, they may view the final report and recommendations as an external imposition. This can lead to resistance, lack of commitment, and failure to integrate the findings into the organization's long-term strategy.</p>
<p>Dedicated, full-time attention to the diagnostics which can make the process more efficient, both in terms of time use and resource utilization.</p>	<p>Engaging external consultants can be significantly more expensive than conducting an internal audit, which can be a barrier, especially for smaller or less-resourced organizations.</p>

# Annex C:

## Sample Diagnostic Tools

### Tool 1: Document Review Checklist

Document Type	Gender-Specific Content Present? (Yes/No)	Examples/Notes (Education-Specific)	Gender Marker/ Continuum Category	Gaps Identified	Recommendations
Strategic Plan		1			
Annual Report		2			
Budget Documents		3			
Human Resources Policies		4			
Program/ Project Guidelines		5			
Training Materials		6			
Monitoring, Evaluation, and Learning Frameworks		7			
Curriculum and Teaching-Learning Materials (TLMs)		8			
Safeguarding and Child Protection Policies		9			
Community Engagement Guidelines		10			

1

- Explicit goals related to girls' learning, attendance, retention, or transition
- Commitments to gender-responsive pedagogy
- Plans for increasing women's representation in school leadership

2

- Reporting of sex- and age-disaggregated learning data
- Tracking gender gaps in participation, attendance
- Documentation of gender-transformative activities (e.g., norm change workshops, role model programs)

3

- Budget allocations for gender-responsive activities
- Dedicated funds for girls' scholarships, transportation, safety measures
- Staffing budget including female teacher recruitment or leadership development
- Evidence of gender budgeting or expenditure tracking

4

- Policies supporting gender-equitable hiring and promotion
- Anti-harassment and safeguarding policies for staff and students
- Guidelines on preventing bias in classroom assignments, roles, evaluations
- Training requirements on gender-responsive pedagogy

5

- Requirements for sex- and age-disaggregated data collection
- Use of gender analysis in program design
- Guidance on adapting interventions for girls' and boys' different needs
- Expectations for community engagement that includes caregivers of different genders

6

- Modules on gender-responsive pedagogy
- Examples of non-stereotypical characters and occupations
- Guidance on inclusive classroom practices and positive discipline
- Activities that challenge harmful norms in classroom and community settings

7

- Indicators disaggregated by sex, age, disability, and other relevant identities
- Indicators measuring gender norms, agency, safety, or participation
- Tools for capturing unintended gendered consequence
- Plans to monitor changes in teacher attitudes or classroom practices

8

- Representation of girls and boys in diverse, non-stereotypical roles
- Gender-balanced visuals in primers and storybooks
- Content that promotes agency, consent, fairness, and equity
- Activities designed to support equal participation in reading/math tasks

9

- Codes of conduct for teachers and staff
- Risk assessments that include gender-based risks (e.g., travel to school, sanitation facilities)
- Referral mechanisms for psychosocial and legal support

10

- Strategies encouraging fathers' involvement
- Mother support groups, peer mentors, or women's committees
- Messages addressing harmful norms about girls' mobility, labor, or early marriage

## Tool 2: Staff/Stakeholder Survey

### Section A: Demographics

1. Role in the organization:
2. Department/Unit:
3. Length of time with organization:
4. Gender identity (optional but recommended):

### Section B: Organizational Culture and Practice

1. To what extent do you feel gender equality is prioritized in this organization? (Scale: 1–5) The scale can directly coincide with the [Gender Equality Continuum](#) as well.
2. Do you believe the organization provides equal opportunities for all genders? Please explain.
3. Have you received gender-related training in the last 12 months?
4. How confident are you in addressing gender-related concerns in your work? (Scale: 1–5) The scale can directly coincide with the Gender Equality Continuum as well.
5. What changes would you recommend to move us toward a more Gender Transformative approach?

## Tool 3: Sample Guiding Questions for In-Depth Interviews and Focus Groups

*These are open-ended questions. Please probe for examples and deeper insights as they emerge.*

### Preliminary question:

1. Can you tell me about your role and how long you have been with the organization?

### Main questions:

1. How is gender equality being addressed in the organization's policies and practices?
2. Can you share examples of positive changes related to gender in your work or programs?
3. Have you experienced or observed barriers to gender equality here?
4. What actions could help the organization move toward being more Gender Transformative?
5. What external factors (cultural, political, social) influence how gender work is done here?<sup>5</sup>

### Closing:

1. Is there anything else you would like to share about gender equality in this organization?

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<sup>5</sup>Note the use of organization and not programs is intentional. An organization can be transformative even while implementing gender intentional programs.

# Annex D:

## Sample Scope of Work (SoW)

*Below is a sample SOW that can be adapted for your context. Placeholders are included to support easy customization.*

### **Title: Gender Diagnostic for [Insert Institution Name]**

#### **1. Background**

*[ Insert Institution Name ]* seeks to strengthen gender equality in its policies, programs, teaching practices, and organizational culture. To support this goal, the institution will engage a consultant to conduct a comprehensive gender diagnostic focused on students, staff, leadership, systems, and the broader school ecosystem.

#### **2. Purpose**

The purpose of this assignment is to identify gender-related strengths, gaps, and opportunities within *[ Insert Institution Name ]* to inform future planning and implementation.

#### **3. Objectives**

The consultant will:

1. Assess the institution's policies, programs, and practices through a gender lens.
2. Identify gendered barriers affecting access, safety, participation, and learning for students, including in ECE and FLN programs.
3. Examine systems for preventing and responding to SRGBV.
4. Review HR practices and staff capacity on gender-responsive pedagogy and inclusion.
5. Provide recommendations and a prioritized action plan.

*[ Insert specific areas that must be included, if any ]*

#### **4. Scope of Work**

The consultant will review gender integration across:

- Strategic plans and policies
- Data systems and monitoring practices
- Teaching and learning environments
- Curriculum and teaching and learning materials
- Leadership and decision-making structures
- Staff composition, training, and professional development
- Organizational culture and norms

#### **5. Methodology**

The consultant will apply a mixed-methods approach that includes:

- Document review
- Analysis of sex- and age-disaggregated data
- Interviews with leadership, teachers, and staff
- Focus groups with students and caregivers

- Observation of classrooms and learning spaces
- Participatory tools with students or caregivers
- Validation workshop to review findings

[ Insert any methodological requirements or non-negotiables ]

#### **6. Deliverables**

- Inception Report with refined scope, tools, and timelines
- Draft Gender Diagnostic Report
- Final Gender Diagnostic Report
- Strengths and Gaps Matrix
- Prioritized Action Plan
- Presentation of findings to leadership
- Recommendations for monitoring indicators

#### **7. Timeline**

The assignment will be completed within [Insert timeline, e.g., 8–12 weeks], with key milestones for:

- Inception
- Data collection
- Analysis
- Validation
- Final reporting

#### **8. Qualifications**

The consultant must have:

- Experience in gender in education
- Familiarity with ECD, FLN, and SRGBV frameworks
- Strong qualitative and quantitative skills
- Understanding of education systems
- Fluency in the languages spoken in the community
- Demonstrated experience in ethical research with children

#### **9. Management and Reporting**

The consultant will report to [ Insert position/team ] and coordinate with [Insert focal point] for data access and field visits.

# Annex E:

## Sample Action Plan Template

The following action plan presents illustrative recommendations drawn from a hypothetical gender diagnostic exercise. These examples are provided solely to demonstrate how findings from a gender analysis can be translated into actionable steps within an institution or program. They are not based on actual data or our recommendations, but serve as a guide to support users of the toolkit in developing their own context-specific action plans.

Recommendations from gender diagnostics	Action Steps	Who	When	What	Monitoring Indicators (Qualitative & Quantitative)
<b>1. Increase girls' enrollment and retention by addressing barriers related to safety and transportation</b>	Develop and implement safe transport schemes and girl-friendly school environments (e.g., secure routes, gender-segregated toilets)	Program Manager, School Leadership, Community Liaison	Q3 2025 – Q2 2026	Funding for transport, infrastructure upgrades, community mobilization materials	<ul style="list-style-type: none"> <li>• % increase in girls' enrollment and retention rates (quantitative) -</li> <li>Number and type of safety incidents reported, and resolution outcomes (qualitative) - Girls' perceptions of safety in school and en route (survey/ focus groups) (qualitative)</li> </ul>
<b>2. Improve gender-responsive teaching and learning materials</b>	Review and adapt curriculum and materials to be gender-sensitive and inclusive	Curriculum Specialist, Teachers' Committee	Q4 2025	Gender experts, material development budget	<ul style="list-style-type: none"> <li>• % of curriculum and learning materials reviewed and adapted for gender sensitivity (quantitative) -</li> <li>Teacher and student feedback on inclusivity and relevance of materials (qualitative)</li> </ul>
<b>3. Build capacity of teachers and staff on gender equality and inclusive pedagogy</b>	Conduct regular training workshops on gender-responsive pedagogy and unconscious bias	HR & Training Coordinator, Gender Focal Person	Bi-annual, starting Q3 2026	Training modules, facilitators, budget for workshops	<ul style="list-style-type: none"> <li>• Number and % of teachers/staff trained (quantitative) - Improvement in gender-responsive teaching knowledge and attitudes (pre/post training assessments) (quantitative &amp; qualitative) -</li> <li>Observed changes in classroom practices (monitoring visits) (qualitative)</li> </ul>
<b>4. Enhance mentorship and psychosocial support for girls</b>	Establish mentorship programs pairing girls with female role models; strengthen school counseling services	Program Officers, School Counselors	Q1 2026 onwards	Mentorship framework, counseling resources	<ul style="list-style-type: none"> <li>• Number of active mentorship pairs established (quantitative) - Frequency and quality of counseling sessions (qualitative) -</li> <li>Feedback from mentees on support received and impact on wellbeing and confidence (qualitative)</li> </ul>
<b>5. Engage parents and communities to support girls' education</b>	Organize community dialogues and awareness campaigns on gender equality and girls' education benefits	Community Engagement Team	Quarterly from Q3 2025	Communication materials, community mobilizers	<ul style="list-style-type: none"> <li>• Attendance and diversity of participants at community sessions (quantitative) -</li> <li>Changes in community attitudes towards girls' education (baseline and follow-up surveys) (qualitative &amp; quantitative) -</li> <li>Reports of increased family support for girls' schooling (qualitative)</li> </ul>
<b>6. Collect and analyze sex- and age-disaggregated data</b>	Strengthen data collection systems to track girls' performance and barriers	M&E Officer, Data Team	Ongoing, with quarterly reviews	Data management tools, training	<ul style="list-style-type: none"> <li>• Frequency and quality of sex- and age-disaggregated data reports produced (quantitative) -</li> <li>Evidence of data use in decision-making and program adjustments (qualitative)</li> </ul>

## Annex F: Further Learning and Contacts

To deepen your understanding and enhance the effectiveness of gender diagnostics, the following reputable toolkits offer comprehensive guidance and practical resources. These materials are designed to support practitioners, educators, and program managers in integrating gender-responsive approaches within education systems and projects. They provide evidence-based frameworks, actionable strategies, and contextual insights essential for advancing gender equality and fostering transformative change.

Akina Mama wa Afrika and Hivos (2020) *Gender audit tool: a guide for identifying gaps in gender responsive policies and practices at the workplace*. Kampala: Akina Mama wa Afrika. Available at: [https://www.akinamamawaafrika.org/wp-content/uploads/2020/10/Gender-Audit-Tool\\_FINAL\\_.pdf](https://www.akinamamawaafrika.org/wp-content/uploads/2020/10/Gender-Audit-Tool_FINAL_.pdf) (Accessed: 19 February 2026).

European Institute for Gender Equality (2019) *Gender mainstreaming: gender audit*. Vilnius: EIGE. Available at: <https://eige.europa.eu/publications-resources/toolkits-guides/gender-mainstreaming-toolkit/gender-audit> (Accessed: 19 February 2026).

European Institute for Gender Equality (2019) *Gender analysis*. Vilnius: EIGE. Available at: <https://eige.europa.eu/gender-mainstreaming/methods-tools/gender-analysis> (Accessed: 19 February 2026).

Forum for African Women Educationalists (2020) *Gender-responsive pedagogy: a toolkit for teachers and schools*. 2nd edn. Nairobi: FAWE/UNGEI. Available at: <https://www.ungei.org/publication/gender-responsive-pedagogy-toolkit-teachers-and-schools> (Accessed: 19 February 2026).

Interagency Gender Working Group (n.d.) *The gender integration continuum*. Washington, DC: IGWG. Available at: <https://www.igwg.org/resources/gender-integration-continuum/> (Accessed: 19 February 2026).

International Labour Organization (2012) *A manual for gender audit facilitators: the ILO participatory gender audit methodology*. 2nd edn. Geneva: ILO. Available at: [https://www.ilo.org/wcmsp5/groups/public/---dgreports/---gender/documents/publication/wcms\\_187411.pdf](https://www.ilo.org/wcmsp5/groups/public/---dgreports/---gender/documents/publication/wcms_187411.pdf) (Accessed: 19 February 2026).

United Nations Development Programme (2025) *How to conduct a gender audit: toolkit for auditors*. New York: UNDP. Available at: <https://www.undp.org/publications/how-conduct-gender-audit-toolkit-auditors> (Accessed: 19 February 2026).

UNESCO International Institute for Capacity Building in Africa (2020) *Gender-responsive education: toolkit for teachers, teacher educators, school managers, and curriculum developers in Africa*. Addis Ababa: UNESCO. Available at: <https://unesdoc.unesco.org/ark:/48223/pf0000375869> (Accessed: 19 February 2026).

UNICEF (2024) *Applying the gender integration continuum to social protection*. Florence: UNICEF Innocenti – Global Office of Research and Foresight. Available at: <https://www.unicef-irc.org/publications/1836-applying-the-gender-integration-continuum-to-social-protection.html> (Accessed: 19 February 2026).

UN Women (2023) *Gender audit guide*. New York: UN Women. Available at: <https://www.unwomen.org/en/digital-library/publications/2023/05/gender-audit-guide> (Accessed: 19 February 2026).

## Global, Regional and Local Contacts/Organizations

For additional guidance, collaboration, or technical support during the gender diagnostics process, connecting with specialized organizations and experts can be invaluable. Below are reputable bodies and networks within East Africa, India, and globally that offer expertise, advocacy, training, and resources in gender equality and education:

### East Africa

- **Akili Dada:** Based in Kenya, it is a leadership incubator for young African women addressing gender inequity in education and leadership. Website: [www.akilidada.org](http://www.akilidada.org)
- **Forum for African Women Educationalists (FAWE):** It coordinates and supports 34 national chapters across the African region including East Africa. It leads advocacy, capacity building, and implementation of gender-responsive education initiatives aimed at increasing girls' participation and success in education. Website: [www.fawe.org](http://www.fawe.org)
- **Jaslika:** Jaslika, an intersectional feminist consultancy and non-profit, advances gender equality and human rights in education and development. Guided by Ubuntu, and working with schools, communities, and governments they use research, policy, training, and partnerships to create evidence-based solutions to dismantle systemic inequalities. Website: [www.jaslika.com](http://www.jaslika.com)
- **Kenya National Commission on Gender Equality and Women's Empowerment (Kenya)** Independent Constitutional Commission mandated to promote gender equality in Kenya through monitoring and advising on the integration of equality principles into policies and laws, conducting research, acting as the state's principal organ for ensuring compliance with international treaties on equality, and coordinating public education on equality and inclusion. Website: [www.ngeckkenya.org](http://www.ngeckkenya.org)

### India

- **Gender At Work:** Gender at Work supports organisations through gender audits and diagnostics that uncover hidden biases, strengthen systems, and advance equity and inclusion. Website: <https://www.gendematworkindia.org/>
- **Sattva Consulting:** Sattva Consulting is a social impact advisory firm that works with businesses, philanthropies, and nonprofits to design and scale solutions advancing gender equity and inclusive development. Website: <https://www.sattva.co.in/our-work/>
- **One Future Collective:** One Future Collective offers bespoke consulting services to design and conduct gender audits that assess systems, policies, and culture, and provide actionable pathways to equity and inclusion. Website: <https://www.onefuturecollective.org/>

### Global

- **International Center for Research on Women (ICRW):** Research and policy advocacy on gender equality globally. Website: [www.icrw.org](http://www.icrw.org)
- **UN Women:** Global champion for gender equality providing tools, data, and policy guidance. Website: [www.unwomen.org](http://www.unwomen.org)

# Annex G:

## Toolkit Feedback

Your experience using this Gender Diagnostic Toolkit is invaluable to us. We encourage all users, whether grantees, consultants, partners, or organizational staff, to share their insights, challenges, and suggestions for improvement. Your feedback will directly inform future updates, ensuring the toolkit remains practical, relevant, and aligned with evolving gender equality standards and best practices.

Please consider providing feedback on the following aspects:

- Clarity and usability of guidance and tools
- Relevance to diverse organizational contexts and program stages
- Effectiveness in supporting meaningful gender mainstreaming and transformative change
- Gaps or topics you feel require deeper coverage
- Any technical or practical challenges encountered during implementation

To submit your feedback, please contact Echidna Giving at [echidna@echidnagiving.org](mailto:echidna@echidnagiving.org) or complete the feedback form available at <https://gender-toolkit.short.gy/feedback>.

### Gender Diagnostic Toolkit Feedback Form

Thank you for using the Gender Diagnostic Toolkit. Your feedback is crucial to improving this resource. Please take a few minutes to share your experience.

#### 1. User Information

- Name (optional): \_\_\_\_\_
- Organization: \_\_\_\_\_
- Role/Position: \_\_\_\_\_
- Country/Region: \_\_\_\_\_

#### 2. Toolkit Usability

a. How clear and easy to understand was the guidance provided?

- Very Clear     Clear     Somewhat Clear     Not Clear

b. Were the tools and templates practical and relevant to your work?

- Very Practical     Practical     Somewhat Practical     Not Practical

#### 3. Relevance and Coverage

a. Did the toolkit adequately address your organizational context and program stage?

- Yes     Partially     No

b. What topics or sections did you find most useful?

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c. Are there any topics or issues you think need more coverage?

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**4. Impact and Effectiveness**

a. Has the toolkit helped improve your organization’s approach to gender mainstreaming?

- Significantly     Somewhat     Slightly     Not at All

b. Please describe any positive outcomes or challenges you experienced when using the toolkit

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**5. Overall Feedback**

a. What did you like most about the toolkit?

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b. What improvements or additions would you suggest for future versions?

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**6. Additional Comments**

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**Please submit this form to:**

Email: [feedback@echidnagiving.org](mailto:feedback@echidnagiving.org)

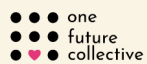
Or online form link: <https://gender-toolkit.short.gy/feedback>







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